bds Biscom Delivery Server

User's Guide

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Introduction

Using Biscom SFT to securely send files, messages, and documents is as easy as sending an e-mail, and provides you with greater control over how, when, and who receives your important data and documents.

Biscom SFT features include:

- Delivery of any type and size of file or message
- Delivery to anyone with a valid e-mail address
- Control of access privileges to files
- Detailed reporting, including reports on deliveries, packages, users, and server
- Ability to schedule and expire deliveries
- Password-protected deliveries
- E-mail notification when a recipient views a delivery
- Support for LDAP and Active Directory for easier user management
- Desktop client that supports drag and drop, automatic restart on network or power failure
- Easy customization -- including logos, colors, and fonts -- through style sheets
- Microsoft Outlook integration
- Java and Web services APIs for tight integration with existing applications and databases

This User's Guide is written for users of the Biscom SFT application and will cover the following topics:

- Biscom SFT Concepts and Overview
- General Navigation and Search
- Registering and Signing In
- Packages
- Deliveries
- Managing Contacts
- Viewing Reports
- Using the Microsoft Outlook add-in
- Frequently Asked Questions

Section 1: Biscom SFT Concepts and Overview

Secure File Transfer

Biscom SFT is designed to securely send e-mail, files, and/or "packages" of files. Secure file transfer (Figure 1) involves three simple steps:

1. Create a package of files and deliver it to any e-mail address.
2. Recipients are notified of their secure delivery in an e-mail message.
3. Recipients sign in to SFT, retrieve the package, and download the files.
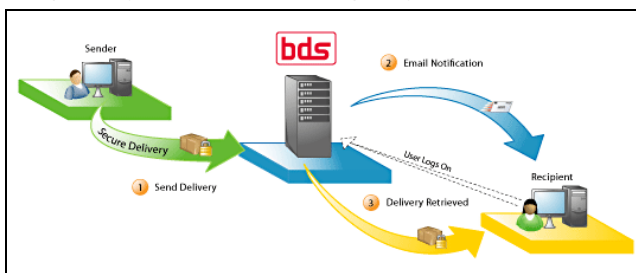
Figure 1: Secure file transfer

Packages

A package is a collection of files and documents along with additional information about the files and ownership, which we define in this document as *metadata*. A package is the entity that is delivered to recipients. The contents and metadata of a package may be updated at any time – the package name, tags, and description may be changed, and files may be added or removed.

Deliveries

Packages are made available to recipients through deliveries. Deliveries are the vehicles through which recipients access packages and through which access control is maintained. A delivery consists of the following elements:

- List of one or more recipients
- Secure message
- Notification e-mail
- Delivery parameters

Delivery parameters may include dates the recipient can access the package, password protection, and other delivery restrictions. Only a valid e-mail address and a subject are required to send a delivery. If a package is updated, a user accessing the package through the delivery will always access the latest package files and metadata, even if the user received the delivery for a previous version of the package.

Users and Roles

Biscom SFT users can hold multiple roles: **Recipient**, **Sender**, **Report**, **Compliance** and **Administrator**. Each role is associated with different privileges and access to Biscom SFT functionality as described in the table below.

Recipient	Recipients can receive and view packages that senders deliver. Recipients may sign in to Biscom SFT and view all the deliveries they have been sent or may use the URL sent to them through an e-mail delivery notification to go directly to the specific delivery.
	Note: *Some deliveries may not require a recipient to have a registered user name. While all other roles require the user to be registered, some recipients may not be required to sign in to the application. These users can only access the specific deliveries they have received and can view only the deliveries through the link provided in the notification e-mail.*
Sender	Biscom SFT users with a Sender role have the ability to create packages and deliver them. Senders own the packages they create and can also be included as an owner of packages that other Senders create. Senders who own packages can modify packages and create deliveries for those packages. A package may have Senders who do not have the ability to edit the package metadata or files but who do have permission to deliver it. Senders can view reports on packages and deliveries they have created or that the Sender owns or can send.

Limited Sender	Users who are not assigned the Sender role may be granted limited send privileges, enabling them to create deliveries and send files. Restrictions may apply to delivering files, and are controlled by the administrator of the application. For example, limited senders may be restricted to send to specific recipients only, may have limits on file size and number of files that can be uploaded. The limited sender role can only be assigned to external users i.e. users outside of your organization. Other restrictions: • 100MB file size upload limit • Standard file upload, no access to Java applet for drag and drop, no support for checkpoint restart • Three files maximum can be uploaded per delivery • No notification to the limited sender when a delivery is viewed by recipients • Recipients cannot securely reply to a limited sender • No access to detailed delivery reports
Owner	Owners are other users in the system who have access to the package and who can add files and modify the package metadata. Users must have the Sender role assigned to them in order to be an owner of a package.
Report	Report viewers have the ability to view special reports and analyses. This role might be assigned to a manager for example.
Compliance	Compliance users have access to specialized reports and can also view other users' packages and deliveries. This powerful role is designed to assist compliance officers and auditors with verifying and tracking usage of the system at the most detailed level, which includes access to the actual packages and deliveries within the system.

Administrator	There are three types of administrators: User administrators, System administrators, and Super users.
	• User administrators can create, edit, and delete non-administrative users.
	• System administrators can perform all User administrator functions, as well as access system reports, configure the system, and assign the User manager role.
	• Super users can perform all System administrator functions, as well as assign the compliance role, and System administrator and Super user roles. Super users also have the ability to define encryption settings.

A user may have multiple roles simultaneously, which provides the user access to different features of Biscom SFT. Administrators assign roles during user creation or user import. When users register on their own, the system automatically assigns the default roles defined by the Administrator, which is most often the Recipient role. Only administrators can assign additional roles to the newly registered users.

To sign in and use the Biscom SFT application, users must authenticate themselves by entering a user name and password. Users must be registered with the Biscom SFT application, either through a self-registration process or created by an Administrator. Once signed in, users have different privileges and will see different icons and features according to their roles. Depending on a user's privileges, a user may administer the system, create and deliver packages, retrieve packages delivered to him or her, and/or view reports.

Reports

Reports enable users to view activity and other information such as package creation and update, delivery creation, notification, and receipt, and user activity. The reports available to a user depend on the roles the user has been assigned. Senders can view reports on deliveries and packages that they own or can send. Administrators can view user activity. Administrators cannot view delivery or package activity unless they have been assigned the Sender role and are also one of the package owners or senders. Compliance users have access to a new section for all compliance-related reports.

Section 2:   General Navigation and Search

General Navigation

The application uses icons (with corresponding text hyperlinks) to represent functionality and help convey information to the user visually. Rollover text boxes accompany most icons.

Application navigation is handled through buttons and hyperlinks. Generally, clicking on successive links, icons, or buttons takes users to more detailed pages, and are deeper in the hierarchical layout of the application.

To help you manage your location within the application, a hyperlinked breadcrumb trail (Figure 2) presents the path a you have taken to reach a particular page. You can click on links in the breadcrumb trail to return to any page along the path
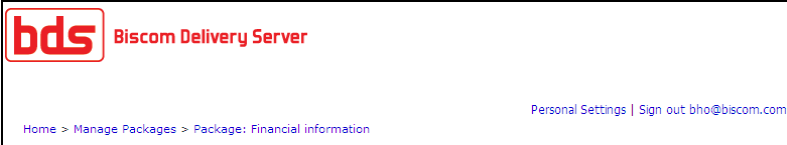

Figure 2: Breadcrumb trail navigation

Pages featuring lists, such as deliveries, packages, users, and reports often have columns that support sorting. Columns that can be used in sorting lists will have visual cues to indicate which columns can be sorted, the current column being sorted, and the sort order (ascending or descending). If a list can be sorted by a column, click the column name to sort by that column. If the list is being sorted by that column already, the sort order will be reversed, otherwise, the listing will be sorted in the default sort order of the column.

Lists may span multiple pages to make long lists more manageable. Lists with multiple pages will have a navigation bar that allows users to move forward or backward one page at a time, to jump to the first page or last page in a list, or to go to a specific item number in a list (Figure 3).
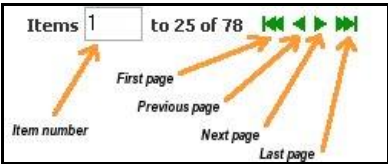

Figure 3: List navigation

To jump to a specific item number, type the item number in the Item field and press the **Enter** key. To move forward or backward by a single page or to the first or last page of the list, click the single or double arrow.

Search Feature

Several pages contain a search box that can be used to narrow down a list: received deliveries, contacts lists, package lists, reports, and several other pages support search. Search results are limited to the particular list you are currently viewing.

> **Note:** *Not all fields are searchable. To view the fields that are searchable, position your mouse over the search box, and a tooltip lists the searchable fields.*

The search terms you enter in the search box will return results that contain any of your search terms. The search function is not case sensitive, so searching for *john smith* will return any results that contain the word *john* **and** the word *smith*, including words that *john* is a part of such as *Johnson*. To broaden your search, us the work "or" between search terms. Wildcards are not necessary for performing searches.

The search

Figure 4: Search results

Filters

Many reports and listing pages may contain a large number of rows. In addition to the search feature, filters enable you to narrow down the total number of rows by eliminating rows that do not contain specific desired elements. For example, administrators see all users in the system when viewing the user management listing page. When the system contains a large number of users, adding filters for roles and statuses can help keep the number of results to a more manageable level.

Figure 5: Filters

Section 3: Registering and Signing in

Registering as a New User

New Users

An Administrator may create users or users may complete a registration form themselves. Administrators can create a user and assign any role to the user. Self-registered users are automatically assigned one or more roles that are defined as the default roles by an Administrator; most Administrators will only assign the Recipient role by default. When an e-mail address that is not currently part of the system is added as a recipient, the user is considered *pre-registered*. An Administrator can update pre-registered users' roles; when a pre-registered user completes his or her registration, the user will have functionality for all roles assigned by default or by an Administrator. If you require additional roles, please contact your Biscom SFT Administrator.

Registering as a New Recipient

To register as a new Biscom SFT user (Recipient role only), follow these steps:

1. From the sign-in page(Figure 6), click the link under Register.

Figure 6: User Sign-In page

> **Note**: *If your organization uses LDAP or Active Directory for your username and password, you should not have to register but should go straight to the sign in page and use your standard network username/password. Also, the registration page may not be viewable if you are only using LDAP/AD.*

2. On the User Registration page (Figure 7), enter an e-mail address and password. If image verification is required, you must correctly enter the graphic letters to register. Terms of service, if enabled, is also a required field.

Figure 7: User registration

> **Note**: _Each e-mail address is a unique user – if you have more than one e-mail address, use the e-mail address for which you would like to receive deliveries._

3. Enter your password again to confirm it. Note that some systems may have specific password requirements for length and types of characters required.

4. You may be required to enter a password reset question. Depending on the server configuration, you may be allowed to select from a list of questions or you may be allowed to enter your own question. If this is required, you must select a question and enter an answer to the question. A hint is optional, but it may help you remember the answer to the question.

5. If image verification is required, type in the characters displayed in the image.

6. If terms of service is defined, check the checkbox if you agree to the terms and service. If this checkbox is not checked, the registration button will not be enabled.

7. Click the **Register** button to submit your information.

Activating your Account

The SFT server you register with may require an activation step to complete registration. If the SFT server does require registration, SFT will send a message to your e-mail address with an activation link (Figure 9).

```
Dear Bob Barker,

Thank you for registering for an account. To activate your account,
click on the link below.
http://download.biscom.com/bds/Activate.do?uid=420&code=56375156

If you are having problems with the link above, you can manually
enter your username and activation code here:
http://download.biscom.com/bds/Activate.do

Your username is: bob-barker-2008@yahoo.com
Your activation code is: 56375156


Please note: This email was sent from an address that cannot accept
incoming emails. Please do not reply to this message.
```

Figure 8: Activation e-mail

1. Click the activation link to complete the registration process. If you have problems with the activation link, you can submit your activation information by going to the manual activation page and entering your username and activation code.

2. Once activated, you will receive an e-mail confirming your activation (Figure 9). An embedded link to the sign-in page is included.

```
Dear Bob Barker,

Your account has been activated.
Your username is: bob-barker-2008@yahoo.com

To sign in, click on the link below:
http://download.biscom.com/bds/Login.do


Please note: This email was sent from an address that cannot accept
incoming emails. Please do not reply to this message.
```

Figure 9: Activation confirmation

Signing In and Signing Out

Signing In

To sign in to the Biscom SFT application, follow these steps:

1. If you clicked a link in an e-mail message that notified you that you had a delivery, you are directed to the Sign In page. You may also, enter the URL, given to you by your system administrator, in a Web browser.

 a. For standard users (non-AD/LDAP users), sign in using your e-mail address and password.

Please enter your username and password to sign in

User sign in

Username

Password

Domain

☐ Remember my username

Sign in

Forgot your password?

Register
If you don't have a username, register here.

Learn More
Tell me more about Biscom Delivery Server.

Figure 10: User sign in page

 b. For LDAP and Active Directory enabled applications, a *domain* field will be displayed. Administrators may assign a default domain for users, so you may not need to enter a domain in this field. If no domain field is visible and you have a specific domain you would like to use, preface the username with the domain name as follows:

   <domain name>\<username>

4. Optionally select the "Remember my username" checkbox to save your user name for the next time you sign in.

5. If you've forgotten your password, click the **Forgot your password?** link. Resetting your password will only be available to users who entered a password reset question and answer when they registered (see Registering as a New Recipient, page 16). If you have not entered this information, you must contact an Administrator to reset your password.

> **Note:** If you enter an invalid password N number of times (N being pre-determined by your system administrator), you are "locked out" of SFT for a set number of minutes, also predetermined by the administrator. If you attempt to sign in during the lock-out period, you will see a message indicating how many more minutes remain until your account automatically unlocks and is reset.
>
> After the set amount of time, you have another N number of opportunities to enter the correct password before being locked out again. If your account auto-unlock is reset a certain number of times, you may be permanently locked out. A message will display, directing

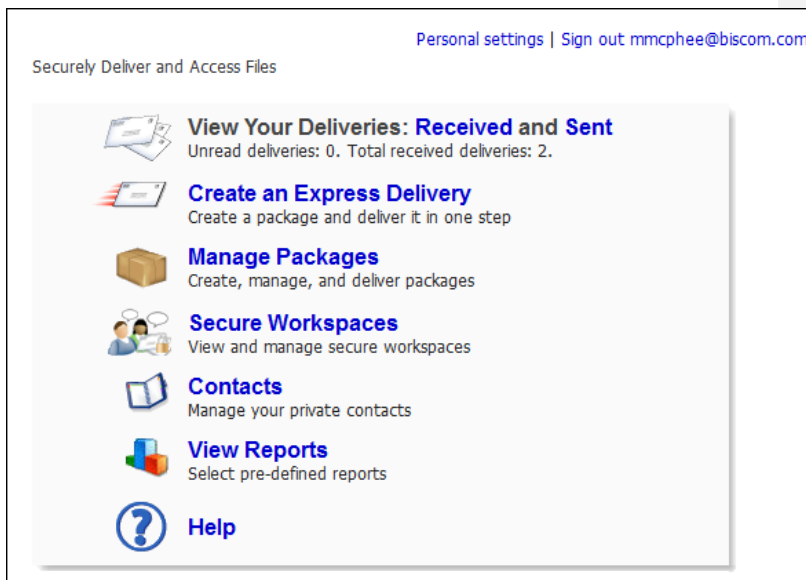6. You are directed to the Home page (Figure 11).

Figure 11: Home page

The icons you see on the Home page are determined by the roles you are assigned. The figure above shows the Home page for a user with both the Recipient and Sender roles.

Signing Out

To sign out and end your Biscom SFT session, click the **Sign out: <username>** link at the top right of the page.

Biscom SFT will also sign out users automatically after a certain period of inactivity. Please ask an Administrator if you have questions about the session timeout duration.

Changing your Personal Settings

You can change your personal settings to update your personal information, your password and/or your preferences

To change your personal settings, click the **Personal Settings** link at the top right of any page. You are directed to the Personal Settings Page (Figure 12):
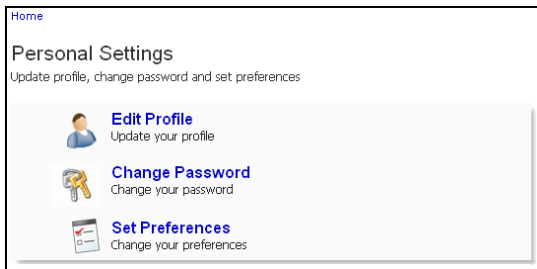

Figure 12: Personal Settings page

From here, you can choose to edit your profile, change your password, or set your preferences.

Editing Your Profile

To update your personal information, follow these steps:

1. Click the **Edit Profile** link on the Personal Settings page. The Update Profile page appears (Figure 13).

Figure 13: Update Profile page

2. Enter your changes and click the **Update** button. When finished, click the **Back** button to return to the main menu.

> **Note:** *If you modify your personal information, and click the **Change Password** link, your changes will be lost. Click the **Update** button first to save any changes before changing your password.*

3. You may also change your password from this page. Click the **Change password** link, and follow the instructions in the next section.

> **Note:** *If the system has predefined password reset questions, you must choose one of the questions to answer. If the system has not defined any password questions, you may enter your own question to answer. In order to use the password reset feature, you must select a question and supply an answer.*

Changing your Password

1. Click the **Edit Profile** link on the Personal Settings page (Figure 12).
2. Enter your current password in the Old password text box (Figure 14).

Figure 14: Change My Password page

3. Enter a new password in the New Password textbox.
4. Re-enter the new password in the Confirm Password box.
5. Click the **Update** button to save your new password.

Setting Your Preferences

1. Click the **Set Preferences** link on the Personal Settings page (Figure 12). The User Preferences Configuration page appears (Figure 15).

Figure 15: User Preferences Configuration page

2. Change and update any of the following preferences:

Preferences for Lists	
Sorting for lists	You can sort the Delivery list (see Figure 44 on p. 62), the Package list (see Figure 23 on p. 34), and the Contact list (see Figure 63 on p. 85) in descending or ascending order by various attributes. Use the drop-down list boxes to select your preferred sorting criteria.
Listing items per page	Enter the number of items you'd like to see listed per page.
Package Options	
Default value for overwrite files checkbox	When you add files to an existing package, you can specify whether to overwrite existing files (see Figure 28 on p. 40). Select whether you want this checkbox checked or unchecked by default.
Delivery Options - Select the default values for your Delivering Package page (see Creating a New Delivery on p. 44)	
Allow applet for upload	By default, SFT uses a Java applet to upload files (see **Files** on p. 29). If you prefer to use standard Web file upload, click the **No** radio button.
Advanced options	When you create an Express Delivery (see p. 53) you can either hide or show the advanced delivery options (see Figure 39 and Figure 40 on p. 54). Select the default view you want to use for creating your Express Deliveries.
Expires (in days)	Enter the number of days in which you want the delivery to expire. If you want the delivery to be effective indefinitely, enter **0**. *Note: Be aware that even if you set your deliveries to be available indefinitely, the packages may still be deleted in certain number of days which is predetermined by your SFT administrator.*
Send e-mail notification to recipients	Select whether you want your deliveries to be set to send an e-mail notification to recipients.
Notify me when recipients delete this delivery	Select whether you want your deliveries to be set so that you're notified when recipients delete this delivery.

Notify when recipients access this delivery	Select whether you want your deliveries to be set so that you are notified when recipients view the delivery.
Notify when recipients download files	Select whether you want your deliveries to be set so that you are notified when recipients download files.
Notify on	Select whether you want your deliveries to be set so that you are notified upon either first access or every access.
E-mail addresses to notify	Enter the address(es) to which you would like to receive notification of delivery access.

Note: *By making the above selections you are selecting your default delivery options. When you create a delivery, these options will be set to the defaults you set here. These options can all be changed for individual deliveries on the Delivering Package page (see Figure 33 on p. 45).*

Section 4: Packages

A package is a collection of files and documents along with additional information about the files and ownership, which we define in this document as *metadata*. A package is the entity that is delivered to recipients. The contents and metadata of a package may be updated at any time – the package name, tags, and description may be changed, and files may be added or removed.

Creating a New Package

Users who have the Sender role can create and deliver packages. To create a new package to send to recipients, follow these steps:

1. From the Home page, click the package icon ![package icon] or the **Manage Packages** link**.** A list of your existing packages will appear (Figure 16).

Figure 16: Package list on Manage Packages page

2. Click the **Create Package** link above the list. The Create Package page appears (Figure 17).

Figure 17: Create package

3. Enter the following information in the appropriate boxes:

Package Name	Enter a descriptive name for the package of files.

Files	For each file you want to include in the package, drag and drop files or entire folders from your desktop onto the Files box(**A** in Figure 17 above), or click the **Add file** button to use a dialog box to select files.
	Note: *When you upload entire folders, SFT automatically compresses those files which can be compressed and creates a ZIP file. The recipient will download the ZIP file before extracting the documents.*
	This upload process uses a Java applet. To use standard Web file upload, click the link **Upload without applet** (**B** in Figure 17 above).
Tags	Enter keywords such as a version number, date, or any other notes or categorization text.
Description	Enter an optional description of the package.
Additional owners	Owners are other users in the system who have access to the package and who can add files and modify the package metadata. Users must have the Sender role assigned to them in order to be an owner of a package. There are three ways you can assign additional owners: • Enter the e-mail addresses of any additional owners of the package. Separate e-mail addresses with a comma or semicolon. • Click the Additional Owners label to see a list of your contacts. Click the Owners checkbox next to the contacts you want to designate as additional owners. Note that the package creator is automatically added as an owner and does not have to be added to this list. • You can assign a group (see Groups on p. 89) as an owner as well. Only group members who have the Sender role will be owners.

Senders	Senders are users who can deliver the package, but who cannot modify the metadata or add or remove files. There are three ways you can create senders: • Enter the e-mail addresses of any users you want to designate as senders. Separate e-mail addresses with a comma or semicolon. • Click the Senders label to see a list of your contacts. Click the Senders checkbox next to the contacts you want to designate as Senders. • You can assign a group (see Groups on p. 89) as a sender as well. Only group members who have the Sender role will be senders.
Allow collaboration	By default the checkbox is clear. If the checkbox is selected, the recipients of the package will be able to send a secure reply to all, including package sender(s), additional owners, and recipients. (See p. 64 for more information on secure replies.)
Auto delete date	**Note:** *This field appears only if your system administrator has enabled this feature.* This field specifies the date and time at which the package, including any active deliveries and files, will be deleted by the system. The default number of days before package deletion is specified by your system administrator. Note that the system administrator may specify certain users or groups to override the package deletion date. Those who do not have the ability to change the date will see a non-editable text box with a date automatically entered for you.
Deletion reminder date	**Note:** *This field appears only if your system administrator has enabled this feature.* Before the system deletes a package, an e-mail notification can be sent to all owners and senders of the package on the date and time specified in this text box.

When you are finished entering the package metadata and files, click the **Save** button at the bottom of the screen.

A green progress bar displays during the upload, and a file summary appears (Figure 18) when the upload is complete.
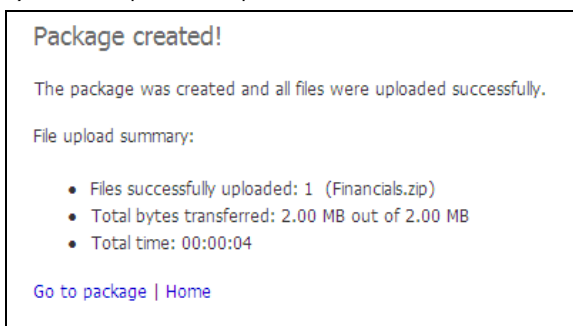

Package created!

The package was created and all files were uploaded successfully.

File upload summary:

- Files successfully uploaded: 1 (Financials.zip)
- Total bytes transferred: 2.00 MB out of 2.00 MB
- Total time: 00:00:04

Go to package | Home

Figure 18: File upload summary

If anti-virus integration is enabled, senders creating a new package or express delivery will see a virus scanning progress window after the files have been uploaded to the SFT server. An icon shows the scan status – in progress (arrows), file checked okay (green checkmark), or file infected or threat detected (red "X").

Express Delivery: Scan for viruses

Files are being scanned for viruses.

	File name	Scan status
✗	username-password-master-list.doc	Infected
↻	Your lab results.pdf	Scanning
✓	EHR-setup.exe	Clean
✓	HL7-data.xml	Clean
✗	ICD-9-2011.pdf	Infected
✓	iview428_setup.exe	Clean
↻	medical-records-logs.zip	Scanning
✓	Medical-records-policies.pdf	Clean
✓	Patient-20309730-chart.pdf	Clean
↻	SEC compliance regulations.doc	Scanning
✓	Surgery prepration guide.doc	Clean

Figure 19: Virus scanning

Files that are found to have an infection will not be added to the package. An e-mail notification will be sent to the user who created the delivery or package for each file found with an infection.

During scanning, the Scan status column will show Scanning. Once file scanning has completed, the scan status column will show one of the following:

- **Clean**: no threat or infection was found

- **Infected**: a threat or infection was found

- **Unable to scan**: scanning failed for some reason, possibly because the file was an encrypted archive, or other unscannable type.

Once scanning is complete, a summary will list all infected files and the specific threats detected.

Delivery Sent with Warnings

The delivery has been sent, but the following files are infected and were not added to the package:

File name	Threat list	Scan start time	Scan end time
username-password-master-list.doc	Win32/Hostblock	06/21/2011 10:53 AM	06/21/2011 10:53 AM
ICD-9-2011.pdf	Win32/Hostblock	06/21/2011 10:53 AM	06/21/2011 10:53 AM

Upload summary:

- Files successfully uploaded: 9 out of 11 (Your lab results.pdf, EHR-setup.exe, HL7-data.xml, iview428_setup.exe, medical-records-logs.zip, Medical-records-policies.pdf, Patient-20309730-chart.pdf, SEC compliance regulations.doc, Surgery prepration guide.doc)
- Total bytes transferred: 125.40 MB out of 179.77 MB
- Total time: 00:04:29

Go to delivery | Home

Figure 20: File infection

Virus scanning software is not 100% accurate, and can mistakenly mark a file as infected when it actually is virus-free. These "false positives" can be overridden by a system administrator by entering a white list that will bypass AV scanning. Contact your system administrator if a file that is known to be free of threats or infection needs to be delivered through SFT.

> **Note:** The package has only been created and securely uploaded to SFT – it had not been sent to anyone. You must create a delivery to send the package to recipients (see Creating a New Delivery on p. 44).

4. Click the **Go to package** link near the bottom of the page. You are directed to the package summary (Figure 21).

> **Note:** Once the package is has been created, it is now available to the specified Owners who can add files, modify the package metadata, and deliver the package. New users will be notified via e-mail that they are now owners of the package.

Figure 21: Package summary

To specify delivery information, click the **Create delivery** button. Creating deliveries is covered in the Deliveries section (page 44).

Additional Anti-Virus Notes

If your administrator has enabled virus scanning for uploaded files, you will see a list of files in the scanning process (Figure 22). Once files are submitted for scanning, users may wait for processing to complete. If users navigate away from the virus scanning progress page, scanning will continue to run in the background. The package will have been created, and any files that are still being scanned, will be displayed in a separate file listing section, indicating that they are still being scanned.

Figure 22: Background virus scanning

Viewing Packages

You can view the packages that you created or packages that you own but were created by others.

1. From the Home page, click the package icon or the **Manage Packages** link. A list of your existing packages will appear (Figure 23).
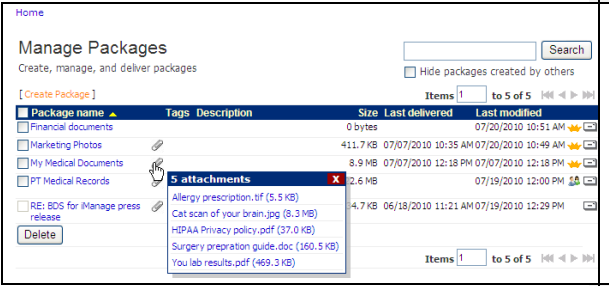
Figure 23: Manage Packages page

> **Note:** *If someone has created a package and made you an owner, that package will appear on the Manage Packages page. To view only the packages that you created, select the checkbox in the upper right corner labeled* **Hide packages created by others**.

Managing Packages

The Manage Packages page (Figure 23) provides a quick overview of all packages of which you are a sender, recipient and/or owner and provides the following information about the packages:

Package name	Each package displays as a link. For more detailed information on an individual package, click the link to view the Package summary page (Figure 21).

Attachments list	To see a list of package contents, roll your mouse pointer over the paperclip icon 📎. A list of attached documents appears as a pop-up list: Each attachment is a hyperlink which you can click to either open or save the file.
Tags	
Description	
Last delivered	
Last modified	
Owners	To see a list of package owners, roll your mouse pointer over one of the icons listed after the last modified date. The crown icon 👑 indicates that you are the creator or the only owner of a package. The group icon 👥 indicates that the package has multiple owners, including you. A tooltip displays, listing the package's owner(s).
Create delivery	To create a delivery, without reviewing the package details, click the deliver icon ▭.
Delete package	To delete a package, select the checkbox next to the package name and click **Delete**.
Hide packages created by others	To view only the packages that you created, select the checkbox in the upper right corner labeled **Hide packages created by others**.

Updating Package Metadata

1. To update package metadata, click the **Edit** link next to the Package Information header at the top of the package summary page (Figure 21).

2. On the Update Package Information page (Figure 24), enter or modify any of the existing metadata and click the **Update** button to save your changes, or click the **Cancel** button to cancel the action.

Figure 24: Update Package Information page

Removing Yourself as a Sender

1. If you have only Sender permission for a package, you will see a **Remove** link in the package details page (Figure 25).

Figure 25: Remove link for user with only a Sender role.

2. To remove yourself as a sender, click **Remove**.

3. You are asked if you are sure you want to remove yourself. Click **OK**. A confirmation page displays. Sender access is now removed and you will not longer have access to the package.

Viewing Package History

1. To view the transactions associated with the package, click the **History** link next to the Package Information header at the top of the Package summary page (Figure 21).

2. On the Package Activity page (Figure 26), you can choose the level of activity detail by selecting Critical, Major, Standard, Detail, or Most Detail from the **Detail Level** drop-down list.
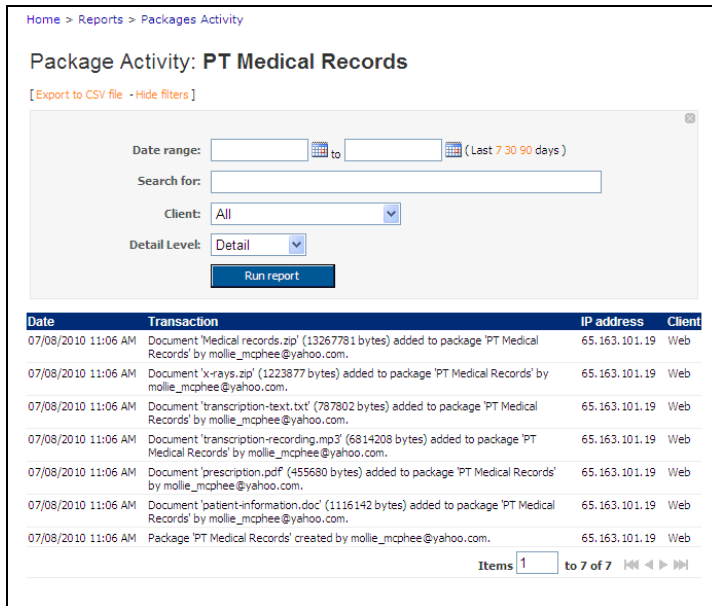
Figure 26: Package Activity page

Deleting the Package

1. To delete a package, click the **Delete package** link next to the Package Information header at the top of the page (see Figure 21 on p. 32).

2. You will be asked to confirm the deletion.

> **Note**: If any deliveries that are currently active or will be active in the future, Biscom SFT will warn you that active deliveries exist and will be deleted along with the package.

3. Click the **Delete** button to delete the package, or click the **Cancel** button to cancel the deletion.

Automatic Package Deletion

If your system administrator enables automatic package deletion, the system will assign a deletion date. The deletion date is determined by the default number of days defined by the system administrator and the date and time you created the package. For example, if the administrator defined 10 days as the automatic deletion date, then a package you created on May 1 will automatically be deleted on May 11.

If enabled, a reminder e-mail will be sent to all package owners and senders a number of days (also defined by the Administrator) before the package will be deleted.

Certain users can be granted override permission – these users are defined by the system administrator. Users with override permission are allowed to change the auto deletion date and reminder date, or even remove the dates altogether. Removing the dates has the effect of making a package perpetual – it can only be deleted manually by an owner.

> **Note:** *When a package is deleted, all deliveries, replies, and files associated with the package and deliveries will also be deleted. Recipients will no longer see the deliveries in their Received Deliveries listing, and links in any e-mail notifications will no longer be valid.*

Adding Files to the Package

1. To add new files to the package, click the **Add** link next to the Files header on the Package summary page (Figure 27).

Figure 27: Add link on Package summary page

2. You are directed to the Add Files page (Figure 28). For each file you want to include in the package, drag and drop files or entire folders from your desktop onto the Files box or click the Add file button to use a dialog box to select files.

> **Note:** *When you upload entire folders, SFT automatically compresses those files which can be compressed and creates a ZIP file. The recipient will download the ZIP file before extracting the documents.*

This upload process uses a Java applet. To use standard Web file upload, click the link **Upload without applet**.

Figure 28: Add Files page

3. If the file name to upload conflicts with an existing file in the package, the file will be created and will have the same name as the existing file. If you want to overwrite the existing file, check the Overwrite Existing File(s) checkbox and the uploaded file will replace the existing file.

4. Click the **Add** button to upload the files or click the **Cancel** button to cancel the action.

> **Note:** *Your system administrator may restrict the file types that you can upload. If your file matches a restricted file type, the upload will fail.*

5. After the files are uploaded, you will be returned to the Package summary page (Figure 21). To add more files, click the **Add** link next to the Files section again and follow the previous steps 2 through 4. There is no limit to the number of files you can upload.

Downloading Files

1. To download files from the package, from the Package summary page (Figure 21), select the files using the checkboxes, and click the **Download with applet** link.

2. A dialog box will appear asking you to select a location to save the file downloads.

3. You will be directed to a download status page that shows the current and total download progress.

Deleting Files from a Package

1. From the Package summary page (Figure 21), select the checkboxes next to the files you wantto delete, and then click the **Delete** button.

2. You will be asked to confirm the deletion of the file or files. Click the **Yes** button to delete the files, or click the **No** button to cancel the deletion.

> **Note**: *You must be an Owner of the package to delete files. Package Senders cannot delete files and the delete button does not appear for Senders.*

Deleting Multiple Packages

If the system administrator enables multiple package deletion, the package list page will display checkboxes next to the packages that you own. If you only have permission to send a package, the checkbox will be disabled and cannot be selected.

> **Warning**: *This is a very risky and irreversible action – other owners may have deliveries that are active, and deleting the package will delete all active deliveries.*

To delete packages, follow these steps:

1. On the Manage Packages page (Figure 16) select one or more packages from the list of packages.

2. Click the **Delete** button at the bottom of the listing.

3. The list of packages you want to delete will be displayed along with the number of active deliveries that exist for each package and the other owners of the package (Figure 29). You can deselect any packages in this list if you no longer wish to delete them.

Figure 29: Confirm Packages Deletion page
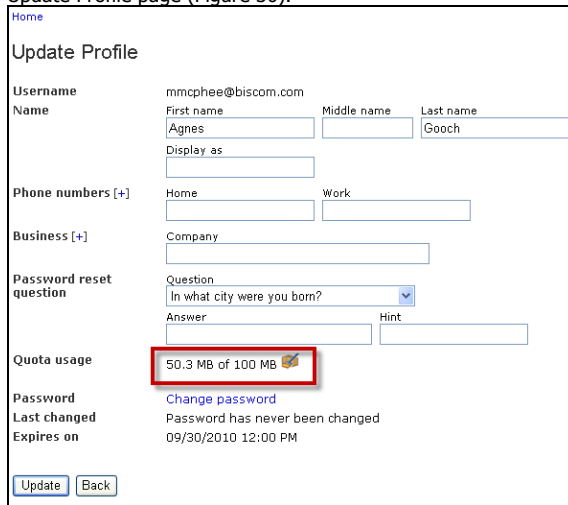
4. Click the **Delete** button to delete the selected packages.

Quotas and Quota Management

Your administrator may impose quotas on SFT users. Quotas affect the amount of storage you have to save files in a package. When you are over quota, you will not be

able to upload new files to packages. However, you will still be able to send existing packages, and create packages but you will be unable to upload files.

To view your quota, click the personal settings link at the top of any page to see your Update Profile page (Figure 30).

Figure 30: Quota usage

If you are within 5% of your quota, you will see a warning message in the main menu (Figure 30).

 Follow these steps to manage your quota:

1.   On your personal settings page (Figure 30) click the icon next to the quota. The Manage Quota Usage page appears (Figure 31).

Figure 31: Manage Quota Usage page

2. To reduce your quota usage, you can simply remove your ownership of one or more packages. Select the packages to which you wish to remove ownership and click **Remove ownership**.

3. You will be prompted to confirm ownership removal (Figure 32).If you are the only owner of a package, you can also delete the package by selecting the checkbox labeled Delete package if I am the only owner.

Figure 32: Confirm ownership removal

> **Note:** For packages that have multiple owners, removing yourself from ownership does not remove the package from the system nor deletes any associated deliveries.

4. Click **Remove ownership**.

Section 5: Deliveries

Packages that a Sender owns may be delivered to registered Biscom SFT users who have the Recipient role or to any unregistered e-mail address. Registered users who do not have the Recipient role cannot be added as delivery recipients.

Deliveries are primarily created by users with the Sender role. However, the Administrator may enable other users to have a limited send capability(see p. 11). The Administrator determines the feature and functions for limited deliveries, but the entire list of possibilities will be covered in this section.

Creating a New Delivery

1. Navigate to the Manage Packages page. From the home page, click the package icon or the link **Manage Packages**.

2. From the list of packages, click the e-mail icon to the right of the package name, or open the package by clicking on the name of the package, and then click the **Create delivery** button.

You will now see the Delivering Package page (Figure 33).

Figure 33: Delivering Package page

3. Enter the delivery information as outlined in the following table:

To, Cc, Bcc	Enter one or more recipients in the To, Cc, or Bcc field. Separate multiple recipients by semicolons or commas or enter addresses on separate lines.
	Alternatively, you can click the **To**, **Cc**, or **Bcc** labels to open your private contacts list. You can select recipients from your list and insert them into the To, Cc, or Bcc fields.
	__Note:__ Recipients in the To and Cc fields will be able to see the other To and Cc recipients. *Recipients in the Bcc field will be able to see the To and Cc recipients, but will not be able to see other Bcc recipients. To and Cc recipients will not see any Bcc recipients.*
Subject	Text entered in the Subject text box will be the subject line of the e-mail notification sent to the recipients. This field is prefilled with the name of the package you are delivering. You may change this or leave the default text, but this field cannot be empty.
Secure message	Enter an optional secure message in the Secure Message text box. This message is not sent in the notification e-mail; recipients must sign in to SFT and view the delivery to see the secure message.
Notification message	Enter an e-mail notification message for the recipients. A default notification message may already exist. You can enter a new message or update the existing message. The contents of this message box will be sent via non-secure e-mail to the recipients. *__Note__: The notification e-mail message will contain a linked URL directing recipients to the SFT server to sign in and view the delivery.*
Add files	You can add additional files to the package. Drag and drop files from your desktop, or click the **Add files** button to open a dialog box to select files to upload.

Date available	You may optionally schedule a delivery to be available at a certain date and time. To do so, enter a date that the delivery should first be available in the following format: MM/DD/YYYY HH:MM AM|PM, for example: **05/26/2015 12:49 PM**. If no date is entered, the current date and time are used as the default date. If the date entered is a future date or time, the delivery notification e-mail will not be sent out until the specified date and time are reached.
Date expires	You may optionally schedule a delivery to expire at a certain date or time. To do so, enter a date that the delivery should no longer be available using the format shown above. If no date is entered, the delivery will never expire. Once a delivery has expired, a recipient will no longer be able to access the delivery using the e-mail notification link, and the delivery will no longer appear in the recipient's list of received deliveries.

Note: An administrator may set an automatic expiration date; if so, the delivery expiration field will contain the default expiration date. However, the sender can change or delete this expiration date. |
| **Password / Confirm password** | You may optionally password protect the specific delivery. Enter a password in both the Password and Confirm password fields. If a password is entered, the recipient will be asked to supply the correct password before being allowed to view the delivery. If the sender creates a no sign-in delivery (see **Recipient sign-in checkbox** below), this password is still required to view the delivery, even though the user will not need to register or sign in to his or her account.

Note: We do not recommend that you include the password in the delivery notification message. The password should be conveyed to your recipients through another channel if possible. |
| **E-mail notification checkbox** | A notification e-mail will be sent by default unless the checkbox is deselected. If you choose not to send a notification e-mail, the recipients may still access the delivery and the package when they sign into the system.

Note: If you deselect this checkbox, the recipients will not see any text you may have entered into the Notification message box since they will not be receiving a notification e-mail. |

Recipient sign-in checkbox	By default, recipients are required to sign in to view deliveries. You may, however, deliver a package without requiring users to sign in.
	If you uncheck the checkbox labeled **Require recipients to sign in**, unregistered users will not be required to register, and registered users will not have to authenticate themselves to view the delivery.
	Note: *Anyone who receives the notification e-mail with the embedded link to the delivery (through either direct e-mail or a forwarded e-mail message) can view the package.*
Notify me checkbox	If you want to be notified via e-mail when a recipient accesses your delivery, select the *Notify me when recipients access this delivery* checkbox. Select the appropriate radio button to request to be notified the first time a recipient accesses the delivery or every time a recipient accesses the delivery.
	Enter the e-mail addresses to notify when recipients access the delivery. E-mail addresses entered do not need to be registered Biscom SFT users.

4. To preview the delivery e-mail notification as it will appear to a recipient, click the **Preview notification** button at the bottom of the page. A new window will appear, displaying the delivery and the URL that is associated with the delivery.

> **Note**: *This URL is not the actual URL that the recipients will see – it is only a placeholder. Each recipient will receive a unique URL in his or her e-mail notification. Also, there may be additional text in the e-mail which is a permanent footer defined by the system administrator. This cannot be modified or deleted by the sender.*

5. When you are satisfied with the delivery, click the **Send** button to deliver the package.

Viewing an Existing Delivery

Deliveries are associated with a package. (For the difference between a package and a delivery, see p. 9.) To view an existing delivery, open the package.

1. From the Home page, click the package icon 📦 or the **Manage Packages** link**.** The Packageinformation page appears (Figure 34). At the bottom of the page, you will see all the deliveries associated with the package.

Figure 34: Package information page

2. To view the delivery, click the delivery name at the bottom of the page. You will now see the delivery details (Figure 35), which include the delivery metadata, the secure message, the notification message, delivery parameters, and package metadata and files that are associated with the delivery.
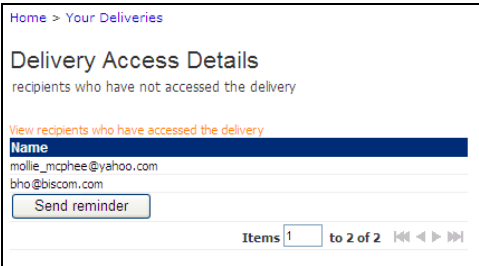
Figure 35: Delivery details page

Actions you can perform associated with a delivery are as follows:

A.	Edit delivery information (see Modifying an Existing Delivery p. 52), delete the delivery (see Deleting an Existing Delivery p. 53), and view a list of past recipients who have accessed the delivery.

B.	View delivery access status. Click the hyperlink to see the Delivery Access Details (Figure 36). To view the recipients who have already accessed the delivery, click the hyperlink (a) **View recipients who have accessed the delivery**. To send a reminder notification, click the **Send reminder** button.
	Figure 36: Delivery Access Details
C.	View and/or download documents in the package (see Downloading Files p. 40)
D.	Securely reply to the delivery (see Replying To Deliveries p.64).

Replying to a Recipient

Senders can update individual recipients with additional messages or files without affecting other recipients. Senders can create "threads" to recipients. When a thread exists for a recipient, it appears in the threads listing with the recipient as the thread name. When new replies are created, the system sends an e-mail notification to the recipient of the reply with an embedded link, directing the user to sign in and read the secure reply.

> **Note:** For the recipient's point of view, see the section on **Receiving Deliveries** for details on recipients replying to deliveries.

To create a new thread:

1. On the Delivery details page (Figure 35), under the **Secure reply thread** heading, select the recipient from the **Reply to** drop down list.
2. Enter the subject of the thread. This subject will be used as the subject of the e-mail notification sent to the recipient.
3. Optionally enter a message in the **Message** textbox.
4. Optionally upload files. These files are only accessible by the recipient selected and are not available to other recipients of the delivery.
5. Click the **Reply** button to send the reply.

To reply to an existing thread:

1. Click the thread name you want to reply to.

2. A new subject, message, and files can be created and sent to the selected recipient (Figure 37).

3. Click the **Reply** button to send the reply.

Figure 37: Secure reply

Modifying an Existing Delivery

1. On the Delivery details page (Figure 35), click the **Edit** link next to the Delivery Information header. If you are on the Viewing Package page, you can click the Edit icon next to the delivery.

2. You will see the delivery update page (Figure 38).

Figure 38: Delivery update

3. If a password has been set for the delivery, the Password and Confirm password fields will be filled with asterisks. The number of asterisks will not necessarily match the length of the actual password. To update the password, enter a new password in the Password box, and re-enter the password in the Confirm password field. To remove the password, delete the asterisks in both the Password and Confirm password fields.

4. You can update any of the information on the delivery. If any new recipients are added to the delivery, the new recipient(s) will receive a notification e-mail by default. This can be changed by selecting *Resend notification to all recipients* to send the notification to new and existing recipients, or selecting *Do not resend notification to recipients*, which will not send notifications to either new or existing recipients. Recipients can still use their old notification e-mail to access the delivery, but some delivery parameters may have changed since the last time they opened it.

5. If have chosen to resend a notification, you may preview the e-mail by clicking the **Preview Notification** button.

6. Click **Update** to confirm and save your changes.

7. If you do not want to save any changes or resend the notification, click the **Cancel** button.

Deleting an Existing Delivery

1. From the Delivery Details page (Figure 35), click the **Delete Delivery** link at the top of the page.

2. You will be taken to the Confirm Delivery Deletion page. Click the **Delete** button to delete the delivery or **Cancel** to cancel deleting the delivery. Once deleted, recipients who click on their delivery notification link will no longer have access to the delivery or the package. Also, if a recipient is signed in to Biscom SFT, he will no longer see the delivery in his list of received deliveries.

Express Deliveries

Standard deliveries are created from an existing package – this is a two-step process: create the package and save it, and then create the delivery. In some cases, such as a one-time delivery, a Sender may want to minimize the steps required to send a delivery by creating an express delivery.

The main difference between the two types of deliveries is the package metadata. An express delivery will create a standard package but will use several default values for package metadata and cannot be changed initially by the sender when first creating the package. For example, the express delivery subject will be used as the package name, the package description will be empty, and the sole owner of the package will be the user who created the express delivery.

Creating Express Deliveries

To create an express delivery, follow these steps:

1. From the Home page, click the express delivery icon or the **Create an Express Delivery** link.

2. The Express Delivery page appears (Figure 39: Express Delivery page).

Figure 39: Express Delivery page

Depending on how your administrator set the express delivery default values, you may see a simplified version of the Express Delivery page (Figure 40).

Figure 40: Simple Express Delivery page

To see the expanded version (Figure 39) click the Show Options link highlighted above.

3. Enter the delivery information as outlined in the following table:

To, Cc, Bcc	Enter one or more recipients in the **To**, **Cc**, or **Bcc** field(s). Separate multiple recipients by semicolons or commas or enter e-mail addresses on separate lines.
	Note: *The recipient fields support auto-complete and will pull names from your private contacts as well as the global address list (GAL) if it is configured by your administrator.*
	Alternatively, you can click the **To**, **Cc**, or **Bcc** labels to open your private contacts list. You can select recipients from your list and insert them into the To, Cc, or Bcc field.
	Note: *Recipients in the To and Cc fields will be able to see the other To and Cc recipients.* *Recipients in the Bcc field will be able to see the To and Cc recipients, but will not be able to see other Bcc recipients. To and Cc recipients will not see any Bcc recipients.*
Subject	Enter the subject that will appear as the subject of the notification e-mail.
Secure message	Enter a secure message in the Secure Message text box. Any text entered in this text box will not be part of the notification e-mail, but will be accessible when the recipient signs in to view the delivery.

Files	Click the **Add file** button to browse for files and/or folders. You may also drag and drop files from your desktop into the File name applet window.
	Note: The applet provides additional capabilities, such as the ability to restart at the point of network failure – that is, if a network outage occurs, upon restoration, any files that were uploading will automatically restart the upload from the point where the outage occurred and will not restart at the beginning of the file.
Notification message	Optionally enter text in the Notification message text box. A default notification message may already exist. You can enter a new message or update the existing message. The contents of this message box will be sent via non-secure e-mail to the recipients.
	Note: The notification e-mail message will contain a URL directing recipients to sign in to the SFT server and view the secure delivery.
Date available	You may optionally schedule a delivery to be available at a certain date and time. To do so, enter a date that the delivery should first be available in the following format: MM/DD/YYYY HH:MM AM|PM, for example: **05/26/2015 12:49 PM**.
	If no date is entered, the current date and time are used as the default date. If the date entered is a future date or time, the delivery notification e-mail will not be sent out until the specified date and time are reached.

Date expires	You may optionally schedule a delivery to expire at a certain date or time. To do so, enter a date that the delivery should no longer be available using the format shown above.
	If no date is entered, the delivery will never expire. Once a delivery has expired, a recipient will no longer be able to access the delivery using the e-mail notification link, and the delivery will no longer appear in the recipient's list of received deliveries.
	Note: *An administrator may set an automatic expiration date; if so, the delivery expiration field will contain the default expiration date.*
Auto delete date	**Note:** *This field appears only if your system administrator has enabled this feature.*
	This field specifies the date and time at which the package, including any active deliveries and files, will be deleted by the system. The default number of days before package deletion is specified by your system administrator.
	Note that the system administrator may specify certain users or groups to override the package deletion date. Those who do not have the ability to change the date will see a non-editable text box with a date automatically entered for you.
Deletion reminder date	Administrators may send a reminder notification to all owners of the package several days before the package is deleted.
Password	Optionally enter a password that is specific to this delivery. We recommend you contact the recipients and inform them of the password outside the SFT system.
Confirm password	If a password was entered in the previous text box, re-enter the password to verify it.
Email notification checkbox	A notification e-mail will be sent by default unless the checkbox is deselected. If you choose not to send a notification email, the recipients may still access the delivery and the package when they sign in to the system.

Allow collaboration checkbox	By selecting this box, you are allowing all package recipients, senders, and owners to send a secure reply to all.
Recipient sign-in checkbox	By default, recipients are required to sign in to view deliveries. You may, however, deliver a package without requiring users to sign in. If you deselect the checkbox **Require recipients to sign in**, unregistered users will not be required to register, and registered users will not have to authenticate themselves to view the delivery. *Note: Anyone who receives the notification e-mail with the embedded link to the delivery (through either direct email or a forwarded email message) can view the package.*
Notify me checkbox	If you want to be notified via email when a recipient accesses your delivery, select the **Notify me when recipients access this delivery** checkbox. Select the appropriate radio button to request to be notified the first time a recipient accesses the delivery or every time a recipient accesses the delivery. *Enter the email addresses to notify when recipients access the delivery. The creator of the express delivery will be automatically populated in this field, but the user may be removed and other email addresses entered. Email addresses entered do not need to be Biscom SFT users.*

4. To preview the notification e-mail that the recipient will see, click the **Preview Notification** button.

5. Click **Send** to deliver the package immediately.

You administrator may have configured SFT to use a simpler express delivery screen (Figure 40). The simple send screen shows a lightweight version of the express delivery. Senders can expand the simple screen to show the additional options and fields at any time by clicking the **Show options** link, or shrink the options by clicking the **Hide options** link. Any options that are changed when expanded will be applied even if they are hidden from view.

Modifying Express Deliveries

Express deliveries and the package that is created automatically can be modified like any other package or delivery. Go through the Manage Packages page (see Managing Packages on p.34) to view, modify, or delete the package and express delivery.

Delivery Access Notifications

When a recipient views a delivery, Biscom SFT tracks the action. If access notification was turned on by the sender, an e-mail will be sent to the notification list (see **Notify me checkbox** on p. 48). The delivery access notification contains details such as the delivery name and package name, who accessed it, when the delivery was sent out, and when it was opened (Figure 41).
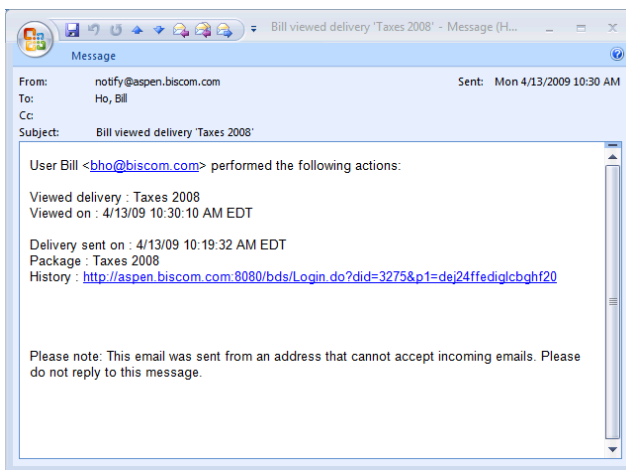

Figure 41: Delivery viewed notification

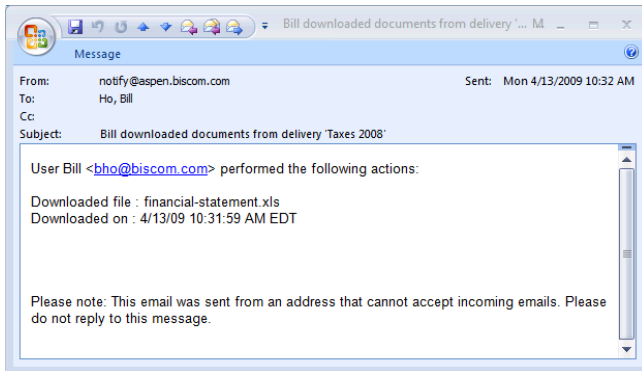When a recipient downloads a file, the SFT system sends a file download notification.

Figure 42: File download notification

Accessing and Viewing Deliveries

When users with the Recipient role sign into the Biscom SFT, they will be able to view all the deliveries they have been sent that are active and have not expired.

Note: When a delivery expires, is deleted, or is retracted by the sender, it will not appear in the recipient's list of deliveries.

Users may also receive an e-mail notification from the SFT application with a URL embedded in the body of the e-mail (Figure 43).
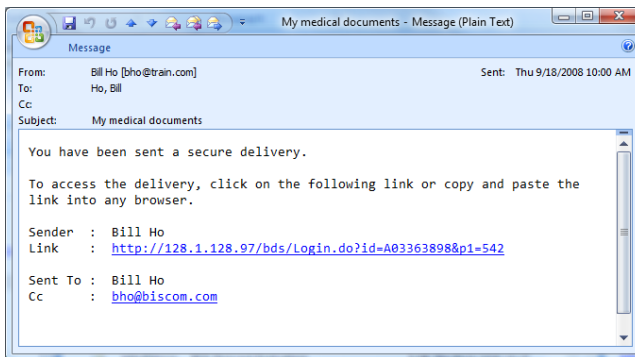

Figure 43: Delivery notification e-mail

If the recipient is already a registered user, and if the Sender required recipients to sign in, the URL directs the recipient to the sign in page (see **Recipient sign-in checkbox** on p. 48).

If the sender did NOT require recipients to sign in, then anyone who received the notification e-mail (either directly or as a forwarded message) can access the delivery and package contents through the URL.

Senders may choose not to send a delivery notification to recipients. In this case, recipients must sign in to the Biscom SFT application and view their received deliveries.

Viewing Deliveries

Deliveries are simply the "gateway" to a package. Packages contain the actual files that a user may download. To retrieve files from a delivery, follow these steps:

1. From the notification e-mail, click the URL embedded in the message, or go directly to the Biscom SFT sign in page.

2. Enter your user name and password if prompted. If you are signing in through an e-mail notification, go to step 4.

3. From the Home page, click the View Deliveries You Have Received icon or click the **View Deliveries You Have Received** link.

4. You will see a list of all the deliveries you have received (Figure 44). Deliveries that are new and have not been viewed appear in bold text. Deliveries that you have already viewed are in normal text. Select the delivery you wish to view by clicking the name of the delivery.

   The **Received** column shows the date the delivery was first received. The **Last activity** column shows the date that some activity occurred in the delivery, such as a reply to the delivery. The closed mail icon also indicates an unread delivery or an unread reply.

   You can delete deliveries you've received by checking the checkboxes next to each delivery and clicking the **Delete** button.

Figure 44: Deliveries received

If you have the Sender role assigned, you will see a link above the list of received deliveries: **View your sent deliveries**. This list (Figure 45) will show the deliveries you sent out to other recipients. This is useful in seeing if any recipients have replied to your deliveries, and it is sorted (by default) based on the last activity date, which could be a new reply.

Figure 45: Deliveries you have sent

5. If your delivery is password protected, you will be prompted to enter the password. This password is specific to the delivery and is assigned by the sender. If you do not have the password, contact the sender.

6. You will now see the delivery on the Your Delivery page (Figure 46).

Figure 46: Viewing your delivery

You will see the delivery metadata such as the other recipients (not including Bcc recipients), the delivery name (subject of the delivery), the date you received it, the date it expires, and the sender. The secure delivery message and the notification message will also be displayed on this page. The delivery also contains the package that has the files you can download or view.

Downloading Files

When viewing a delivery, the list of files included in the package is located below the delivery information section. Clicking the file name will open a dialog box that provides you the option to open or save the file. Click each file name in turn that you would like to open or save. To download and save multiple files at once, select the files using the checkboxes and click the **Download** button, and then click Browse to specify a local directory to download the files to.
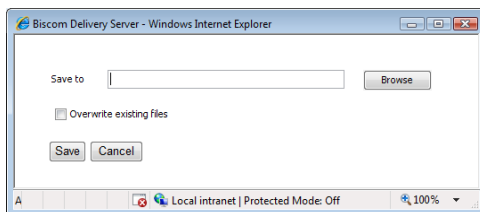
Figure 47: Select download directory

You will see the progress of your downloads on the Download progress page (Figure 48).

Figure 48: Download progress page
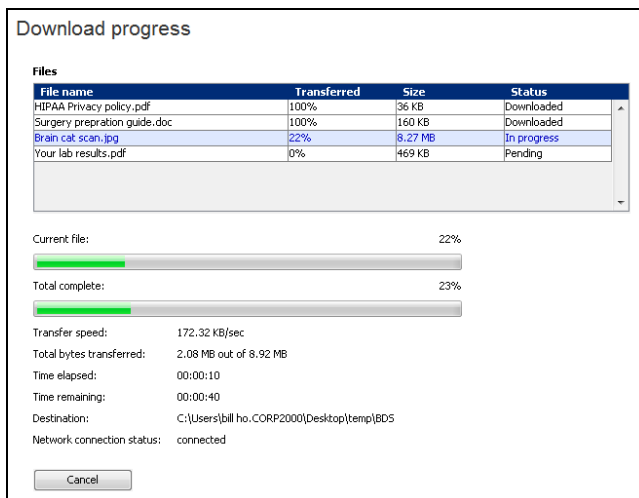
Replying To Deliveries

Recipients of deliveries have the ability to reply securely to the sender via SFT. To reply securely to a delivery, follow these steps:

1. Click the **Reply securely** button at the bottom of the Your Delivery page (Figure 49)

> **Note:** If you do not see the **Reply securely** button, then your administrator has not enabled the secure reply feature.

Figure 49: Reply securely buttons

2. Click one of the **Reply** buttons. Clicking **Reply securely** addresses the reply only to the sender. Clicking **Reply securely to all** addresses the reply to all recipients and owners.

    > ***Note:*** *If you don't see the **Reply securely to all** button, then the sender did not select the Allow Collaboration checkbox when creating the package. See p. 29.*

3. At the bottom of the delivery page, there is a form (Figure 50) containing text fields to enter a reply subject, a secure reply message, and a field to add and upload files.

Figure 50: Secure reply form

4. Complete the reply information and click **Send reply**.

    The system will send an e-mail notification to the sender of the delivery that you have replied to the delivery. The message and documents will be created as a new thread for the sender, visible as a list under **Secure reply thread** (Figure 51).

Figure 51: Recipient delivery with two replies

Some points to keep in mind about secure replies include:

- To view any files attached to the reply, click the reply link in the Secure reply thread.

- Files attached to a secure reply are viewable by the original sender as well as any other owner or sender of the package; other recipients, however, will not have access to the files uploaded through the reply form.

- Original senders can also reply back to individual recipients.
- All owners and senders of a particular package have access to your replies. However, only the owners and senders who participate in the reply topic with you will receive e-mail notifications of new replies.
- If the recipient replies using **Reply securely to all**, then all recipients and owners can see the reply as well as any attached files.

Adding Reply Files to a Package

When a recipient of a delivery attaches documents **and** replies securely to all, the original sender and other package owners can add those reply documents to the original package. As the original send and/or owner of the package, you can see the replies on the Delivery Details page under the **Secure reply thread**.

1. To add the files to the package, click the link to a package addressed to everyone. The secure reply page appears (Figure 52).
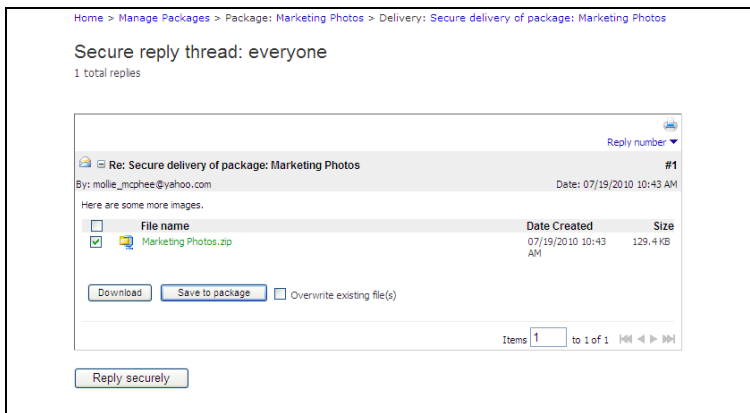
Figure 52: Secure reply sent as a Reply securely to all

2. Select the checkbox next to the files you want to include in the original package. Click Save to package.

3. You will receive confirmation that the files have been added.

   If you navigate back to the original package, you will see that the files from the secure reply to all have been added to the package and are now visible to all owners and recipients.

   Note: *If the reply in the reply thread is addressed only to you, you will be able to view any attached files, but you won't be able to save them directly to the package. If you want to add them to the package, then download and save the files, then add them manually to the package (see p. 39).*

Quotas for Recipients

Recipients may have a quota attached to their account by the system administrator. Each file uploaded through the secure reply mechanism will count toward the quota.

Requiring Payment for a Delivery

SFT can optionally integrate with PayPal for online payments. Packages can be delivered with a payment requirement that must be fulfilled before recipients are allowed to open the delivery and download files.

Delivering a Package with PayPal

When PayPal is enabled by your system administrator, authorized Senders will see a payment section in delivery options on the Delivering Package page (Figure 53).

Figure 53: Delivering Package page with option to require payment

1. To create or update a delivery to require payment from the recipient(s), navigate to the Delivering Package page (Figure 53).
2. Select the **Requires payment** checkbox to activate the Amount field. By default, the Requires Payment checkbox is not checked.
3. Enter an amount (dollars and cents) in USD.

> **Note**: *Commas and the dollar sign ($) should not be entered into this text field. This field supports 8 digits total, or 5 digits for the dollar amount plus the decimal point plus 2 digits for the cent amount.*

4. Fill out the delivery form and send as you would any other delivery. Once sent, the payment amount cannot be changed. A sender may change the amount by deleting the delivery and re-delivering the package and entering a new amount.

> **Note:** *If a recipient is removed from the recipient list, the payment by that recipient will not be automatically refunded. If you, as the Sender, want to refund a recipient's payment, log on to the PayPal site and refund the payment from there. If you do not have a PayPal account, contact your system administrator or other user who has permission to access and process refunds on PayPal. Be sure to remove the recipient from the distribution list by editing delivery details to prevent the recipient from having continued access to the delivery.*

Receiving a Delivery with a Payment Requirement

If you receive a delivery that requires a payment, you will see the PayPal payment button *Buy Now* (Figure 54).

Figure 54: Delivery requiring payment via PayPal

1. Click the **Buy Now** Button. You will be directed to a window where you can either log into your existing PayPal account or use a credit card to pay the sender. You will have the opportunity to review the transaction before committing to the payment as you normally would using PayPal, and can cancel the transaction at any time up to the point where they commit to pay.

Figure 55: PayPal payment window

2. Once the payment requirement is satisfied, you will automatically be redirected back to the delivery where you will be able to view the delivery and download files. SFT will remember your payment status and the delivery can be reopened and files redownloaded without payment.

Reports

As a sender of deliveries that require payment, you have access to reports on those deliveries. You will see the report options when you view your reports. For more information on accessing reports, see the Viewing Reports section beginning on

Deliveries with Payment – by Delivery

Deliveries with Payment – by Recipient

PayPal Monthly Report

PayPal Monthly Report

[Export to CSV file - Show filters]

Year ▲	Month	Number of deliveries	Number of recipients	Invoiced	Received	Difference
2011	July	4	4	$1,262.25	$0.00	($1,262.25)
	Total			**$1,262.25**	**$0.00**	**($1,262.25)**

Items 1 to 1 of 1

PayPal Quarterly Report

PayPal Quarterly Report

[Export to CSV file - Show filters]

Year ▲	Quarter	Number of deliveries	Number of recipients	Invoiced	Received	Difference
2011	Q3	4	4	$1,262.25	$0.00	($1,262.25)
	Total			**$1,262.25**	**$0.00**	**($1,262.25)**

Items 1 to 1 of 1

PayPal Senders Activity Summary

Drill-down for sender activity

Deliveries sent by bho@biscom.com

[Export to CSV file - Show filters]

Date ▼	Delivery	Number of recipients	Total invoiced	Paid	Difference
07/06/2011 09:01 AM	Financial package	1	$10.00	$0.00	($10.00)
07/05/2011 11:22 AM	Additional documents for your case	1	$1,232.25	$0.00	($1,232.25)
07/05/2011 11:02 AM	Secure delivery of package: Your agreement is read...	1	$10.00	$0.00	($10.00)
07/05/2011 10:59 AM	Your agreement is ready	1	$10.00	$0.00	($10.00)
	Total	**4**	**$1,262.25**	**$0.00**	**($1,262.25)**

Items 1 to 4 of 4

PayPal Deliveries Activity Summary – Report Role only

PayPal Deliveries Activity Summary

[Export to CSV file - Show filters]

Date ▼	Delivery	Number of recipients	Invoiced	Paid	Difference
07/06/2011 09:01 AM	Financial package	1	$10.00	$0.00	($10.00)
07/05/2011 11:22 AM	Additional documents for your case	1	$1,232.25	$0.00	($1,232.25)
07/05/2011 11:02 AM	Secure delivery of package: Your agreement is read...	1	$10.00	$0.00	($10.00)
07/05/2011 10:59 AM	Your agreement is ready	1	$10.00	$0.00	($10.00)

Items 1 to 4 of 4

Deliveries Payment User Activities

User activity (recipients)

[Export to CSV file - Show filters]

Date ▼	User	Delivery	Last viewed	Last downloaded	Invoiced	Paid
07/06/2011 09:01 AM	bb7508@yahoo.com	Financial package			$10.00	$0.00
07/05/2011 11:22 AM	bb7508@yahoo.com	Additional documents for your case			$1,232.25	$0.00
07/05/2011 11:02 AM	bb7508@yahoo.com	Secure delivery of package: Your agreement is read...			$10.00	$0.00
07/05/2011 10:59 AM	bho@biscom.com	Your agreement is ready			$10.00	$0.00

Items 1 to 4 of 4

If for some reason a refund must be provided to a recipient, the PayPal account holder or an authorized PayPal user must log into the PayPal account directly and

Other Information

Refunds

Refund are not processed through SFT. Refunds must be initiated through the PayPal web interface by the PayPal account holder or an authorized PayPal user. If for some reason a refund must be provided to a recipient, the PayPal account holder or an authorized PayPal user must log into the PayPal account directly.

Additionally, as the sender you may want to edit the delivery and remove the recipient requesting the refund; however, note that removal of a recipient does not automatically refund the recipient.

Connection Issues

If an issue occurs while the recipient is trying to pay for the delivery, SFT will present the recipient with a message box (Figure 56), which enables the recipient to notify the sender of the problem. Default text is entered into the message text box, and recipients can add their own message as well.

Figure 56: Could not connect to PayPal message

Section 6: Secure Workspaces

If the feature has been enabled by your administrator and you have been assigned a Sender role, you will see an icon and link to your secure workspaces on your homepage. A workspace is a secure area in SFT where multiple users can upload and share files and messages with one another. Three types of users with different permissions can be assigned to the workspace:

> **Manager** – The manager is the creator of the workspace and can add other managers, collaborators, and viewers. A manager can invite any user with a Sender role (including external users) to be a collaborator.

> **Collaborator** – Collaborators can upload and download files, leave comment or messages, and view detailed transaction reports. A collaborator must be assigned the Sender role.

> **Viewer** – A viewer can view but not upload files. A viewer can view comments, but cannot make comments in a workspace nor does he have access to detailed reports or feeds. A viewer must be assigned the Recipient role.

Creating Secure Workspaces

> If you have the Sender role, you can create your own workspaces. To create a secure work space, follow these steps:

> 1. From your home page, click the **Secure Workspaces** link or icon.

> 2. On the Secure Workspaces page (Figure 58) click the orange **Create Workspace** link. The Create Workspace page appears (Figure 57).

Figure 57: Create Workspace page

3. Enter the following information:

Workspace name	
Files	
Tags	
Description	
Additional Managers	
Collaborators	
Viewers	

Viewing Secure Workspaces

1. From the Home page, click the secure workspaces icon ![icon] or the **Secure Workspace** link. The Secure Workspaces window (Figure 58) appears.
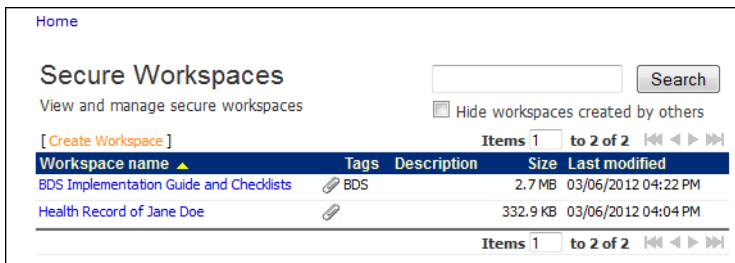
Figure 58: View Secure Workspaces window

A summary of your workspaces and basic details are listed.

2. Use the search field to search workspaces by name, description, or tags.

3. To see a list workspaces created only by you, select the Hide workspaces created by others checkbox and click the Search button.

Using Secure Workspaces

To view the details of individual workspaces and make modifications, follow these steps:

1. Click on the **Workspace name** of the workspace you want to view. A detailed summary of the workspace is shown with, including a list of files, comments, workspace details and a feed of workspace activity. If you are a collaborator, you will also see an area where you can upload additional files to the workspace.
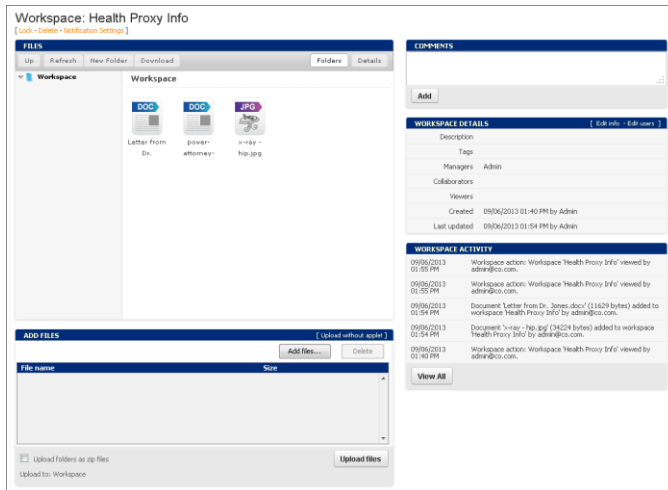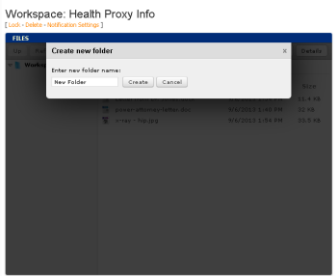
Figure 59: Workspace details

2. From this view, **all users** can perform the following actions:

View a file	Click on the **file name** to view or save a file.
Download files	Select which files you want to download and save, and then click the **Download** button.
Create folders	You can create folders for the workspace files by clicking the **New Folder** button. Enter the name for the folder and click **Create**.
Modify notification settings	By default, notifications are sent to the registered email addresses of workspace users when any of the following activities occur:

	• New file uploaded
	• File updated (replaced or renamed)
	• Workspace comment added
	• Workspace deleted
	Other notifications that are disabled by default include:
	• File downloaded
	• File deleted
	• Other workspace changes (description, tags, etc.)
	• User added
	• User deleted
	• User removes self from workspace
	To modify these settings and select which notification, click the **Notification Settings** link near the top of the page. Click the check boxes to select or deselect which notifications you wish to receive.
View comments	The comments section shows the last five comments added to the workspace. Once more than five comments have been added, you can click **View more** to see all comments.
View Users	Next to the Workspace Details heading, click the link **View users** to see users of the workspace and their privilege level.
Remove yourself from the workspace	If you no longer wish to be a user of the workspace, click the **View users** link, and then click the link **Remove me from this workplace**.

3. Users with **collaborator** privileges can perform the following actions:

Add files	If you're a manager or collaborator, you can upload files. Click **Add files**, select the files to add, and then click **Upload Files**.
Delete files	If you're a manager or collaborator, you can also delete files. Click to select the files you want to delete, and then click the **Delete** button.
Add a comment	To leave a comment or message to all collaborators and viewers of the workspace, click in the text box under Comments, type your message, and then click **Add**.
View workspace activity	You will see a **Workspace activity** heading in the bottom right corner. This is a feed of recent activity related to the workspace. To view a detailed transaction history of the workspace, click the **View all** button. The Workspace activity page appears:

Workspace Activity: **Health Record of Jane Doe**

[Export to CSV file - Show filters]

Date	Transaction	IP address	Client
03/07/2012 11:46 AM	Collaborator srahman@biscom.com added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/07/2012 11:46 AM	Collaborator bho@biscom.com added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/07/2012 11:24 AM	Document '03 wellness.gif' downloaded (42751 of 42751 bytes) from workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/07/2012 11:23 AM	Document '03 wellness.gif' downloaded (42751 of 42751 bytes) from workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/07/2012 11:12 AM	Document 'Filing.docx' downloaded (298113 of 298113 bytes) from workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/07/2012 11:12 AM	Document '03 wellness.gif' downloaded (42751 of 42751 bytes) from workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/06/2012 04:04 PM	Document 'Filing.docx' (298113 bytes) added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/06/2012 04:04 PM	Document '03 wellness.gif' (42751 bytes) added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com	65.163.101.19	Web
03/06/2012 04:04 PM	Viewer mollie_mcphee@yahoo.com added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web
03/06/2012 04:04 PM	Collaborator maisiecooper@yahoo.com added to workspace 'Health Record of Jane Doe' by mmcphee@biscom.com.	65.163.101.19	Web

Items 1 to 10 of 10 |◀◀ ◀ ▶ ▶▶|

Workspace Activity page

Search workspace activity	From the **Workspace Activity** page (above) click the **Show filters** link. The search filters appear:
	Enter your search criteria, and then click **Run Report** to see the filtered workspace activity.
Export workspace activity	From the **Workspace Activity** page (above) click the **Export to CSV file** link, and then click **Save**.

Managing Secure Workspaces

If you are a **manager** of the workspace, you can perform the same actions as Viewers and Collaborators. You also have additional workspace management privileges.

Lock a Workspace

To prevent Collaborators from adding or deleting files from the workspace, click the **Lock** link above the list of files. You will be asked to confirm whether you want to lock the space. When a workspace is locked, collaborators will not see either the **Add files** or **Delete** buttons.

To unlock the workspace, click the **Unlock** link. You will be prompted to confirm that you want to unlock it.

Delete a Workspace

To delete an entire workspace, click the **Delete** link above the list of files. You will be asked to confirm the deletion of the workspace. Once you delete the workspace, there is no way to recover the files.

Edit workspace Details

To modify workspace details, click the **Edit info** link next to the **Workspace Details** heading. The Update Secure Workspace Information page appears (Figure 60).

Commented [MM7]: What
still add or delete files? What
workspace—can other mana

Figure 60: The Update Secure Workspace Information page

Enter or modify the following information:

Name	If you want to change the name of the secure workspace, enter a new name.
Description	Add an optional description of the purpose of the workspace.
Tags	An optional field to enter keywords or tags associated with the workspace.
Auto delete date	The auto-delete date is a default date set by the system administrator. By default, no user may change this deletion schedule. However, if your system is configured to allow specific managers to override the date, the Auto delete date field will be editable. Enter a new auto-delete date or click the calendar to select a new date. If you leave this field blank the workspace will remain active indefinitely.
Deletion reminder date	If you have permission to edit the deletion dates, you can also modify the date on which a notification will be sent to all workspace users reminding them of workspace deletion. If you leave this field blank, no notification will be sent.

Be certain to click **Update** to save your changes.

Commented [MM8]: Anyth about this?

Manage Workspace Users

To manage workspaces users, the **Edit users** link next to the **Workspace Details** heading. The Manage Workspace Users page appears (Figure 61).

Home > Secure Workspaces > Workspace: Windows Installer Documentation

Manage Workspace Users
View and update workspace users

Workspace name	Windows Installer Documentation
Managers	mmcphee@biscom.com, vvandoorne@biscom.com
Collaborators	maisiecooper@yahoo.com, gkhorn@biscom.com
Viewers	mollie_mcphee@yahoo.com

Remove me from this workspace

Update   Back

Figure 61: Manage Workspace Users page

Enter or modify the following information:

Managers	Enter the e-mail addresses of any additional managers you would like to add to the workspace.
	To remove a manager, highlight the e-mail address and press the delete key.
Collaborators	Enter the e-mail address of any additional collaborators you would like to add to the workspace.
	To remove a collaborator, highlight the e-mail address and press the delete key.
Viewers	Enter the e-mail address of any additional viewers you would like to add to the workspace.
	To remove a viewer, highlight the e-mail address and press the delete key.
Remove me from	All workspace users can choose to be removed from the

| this workspace | workspace. If you are the only manager, however, you will not be able to unsubscribe until you add another manager to the workspace. |

Be certain to click **Update** to save your changes.

Section 7: Managing Contacts

Using Contacts

Each user can create a contacts list, which appears as a pop-up window containing a list of selectable contacts. When delivering a package, a Sender can click on one of the recipient labels (To, Cc, Bcc) and select recipients from his or her contact list. When creating or editing a package, clicking the Owner and Sender labels will open a popup window with a list of your contacts who are also registered users and who have the Sender role assigned to them. Contacts who do not have the Sender role assigned to them will not appear in the list of contacts when you click the Sender label. (See **Senders** on p. 29.)

Groups are also managed through Contacts. You can create, manage, and delete groups through the Contacts interface. Groups can be used in both deliveries and packages. You can deliver a package to one or more groups. You can also assign package owners and senders through groups.

Viewing Contacts

To view contacts, click the Contacts link or icon in the application Home page (Figure 62).

Figure 62: Contacts link

Your contacts will be listed in the Contacts list (Figure 63). Using the search field, you can search for your contacts based on e-mail address, name, and company. Click one of the column headings to sort the contacts. Clicking the same column heading again will reverse the current sort order.
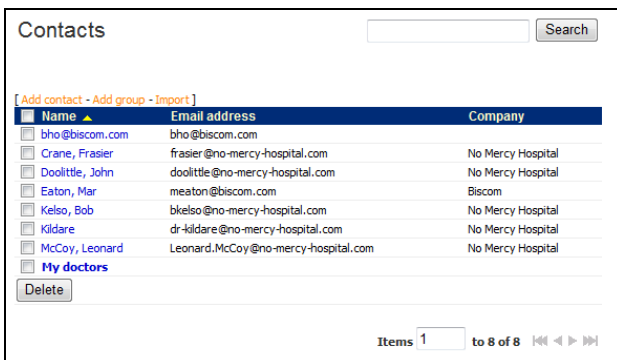
Figure 63: Contacts list

Creating a New Contact

1. Click the **Add** link at the top of your Contacts page to create a new contact.
2. Enter contact data on the Create New Contact page (Figure 64), which includes text boxes for personal and business address information, phone numbers, and notes.

Figure 64: Create New Contact page

3. Click the **Add** button to save the contact's information to your contacts list.

Updating Contacts

1. From the Contacts list (Figure 63), click the contact name. The Update Contact page appears (Figure 65).
2. Enter new information or change existing information and click the **Update** button to save your changes.

Figure 65: Update Contact page

Deleting Contacts

1. From the Contacts list (Figure 63), select the checkboxes next to each contact you wish to delete and click the **Delete** button.

2. You will be prompted to confirm the deletion of the selected contacts (Figure 66).

Figure 66: Delete Contacts confirmation

3. Click the **Delete** button to confirm the deletion.

Importing Contacts

You can import contacts from a CSV or XML file to facilitate entering large numbers of contacts.

1. To import contacts, click the **Import** link near the top of the Contacts list (Figure 63).

2. On the Contact Import page (Figure 67), click the **Browse** button to locate the file you want to import.

Figure 67: Contact Import page

3. When importing a tab-delimited file, some users will insert additional tabs to visually improve the format of the data. If the CSV file contains additional tabs for formatting, select the checkbox **Treat consecutive delimiters as one**.

> **Note**: *This feature only works if all import fields contain text. If any field is not entered (left empty), the import will fail. We recommend you do not insert extra tabs in your import file. See Appendix A for information on the file formats.*

4. Click the **Import** button to begin the import action.

Adding Contacts from a Delivery

When you create a new delivery, Biscom SFT will check to see if any recipients are not in your contact list. If any new recipients are found, they will be listed in your Delivery confirmation message (Figure 68).

Click the checkbox next to a contact to deselect it. Click the **Add to Contacts** button to add the checked contacts your contacts list.

Figure 68: Adding contacts from a delivery

Groups

Groups are simply a collection of e-mail addresses. Groups are defined by three things:

Members	The affected users. When used to send deliveries, members are the recipients.
Managers	Users of the group who can make modifications to the group and its members, managers, and shared users. By default, the user creating a group is a manager.
Shared users	Users who can use the group, but cannot modify the group or its members.

Group members are unaware of roles associated with them; members can be any kind of user. However, when a group is used in the context of delivering a package, only group members who have the Recipient role assigned to them will be sent the delivery. Similarly, if a group is used in the context of assigning package owners or senders, only members who have the Sender role will have access to the package.

Creating a Group

1. To create a new group, go to the Contacts page and click the **Add group** link. The Create New Group page appears (Figure 69).

Figure 69: Create New Group page

2. Enter a group name. The group name must be unique.

   Note: Group names must be unique and cannot conflict with other users' group names.

3. Optionally enter a group description.

4. Optionally enter the e-mail addresses of the members of the group, or click the **Members** link and to the left of the text area and select users from your list of contacts.

5. Optionally enter the e-mail addresses of other users who will be managers of the group, or click the **Managed by** link to select users from your list of contacts.

6. Optionally enter the e-mail addresses (separated by commas) of the users who will be sharing the group, or click the **Shared with** link to select users from your list of contacts..

> **Note**: *You cannot add other groups as members, managers, and shared users – that is, nested groups are not allowed.*

Editing an Existing Group

1. Group managers can modify existing groups in the Contacts page (Figure 63) by clicking on the group name.

2. Any changes to a group are reflected immediately in all deliveries and packages that the group is used in.

   a. If you delete a member from a group, access to all deliveries sent to the group and packages owned by the group are removed from the member's account.

   b. If you add a member to a group that is a recipient of a delivery, the new member will have access to all deliveries sent to the group, as well as any packages owned by the group. New group members will not be notified of new deliveries or packages they can now access.

Deleting a Group

1. From the Contacts page (Figure 63), select one or more groups using the checkboxes and click the **Delete** button.

2. You will be asked to confirm the deletion of the selected groups. Press the **Delete** button to confirm the deletion.

> **Note**: *You can only delete groups that you manage.*

Sending a Delivery to a Group

Using a group as a recipient of a delivery is useful for managing a large number of recipients, or recipients that may change dynamically. For example, you might have a group called "My doctors" that consists of all the physicians whose care you are under. After having a test done, you'd like to send this information out to all of them. So, you create a package with the

documents, and then create a delivery to "My doctors". The package will be delivered to your list of doctors.

Figure 70: Delivering to a group

Later, you add a new doctor for a new condition you have been diagnosed with, and you would like to get the new person up to speed by providing all of your documentation. When you add the doctor to your group, she immediately has access to all the packages you delivered to the existing doctors. Similarly, removing a doctor from the group will remove that doctor's access to any deliveries sent to the group.

Groups and packages

Senders and Owners are associated with . Senders can deliver the package to recipients. Owners of a package can make modifications to the package in addition to being able to deliver packages.

Groups make assigning package senders and owners simple. For many packages, senders and owners can be very dynamic, with changes happening frequently. If a new user is added to an existing group, that user is given access to any packages that the group already owns or can send.

__Note__: Because groups do not differentiate users and their roles, when assigning a group to be a package sender or owner, only those group members who have the Sender role will have access to the package. If a group contains members who only have the Recipient role, none of those members will have access to the package; however, the group will still be shown as one of the package senders or owners.

Section 8: Viewing Reports

Biscom SFT records the transactions that occur in the application and can generate reports on Deliveries activity, Package activity, User activity, and System information. The reports available to you depend on the roles you have been assigned. For example, users with the Sender role will be able to view reports on packages and deliveries. Administrators will be able to view additional reports on user activity. Report readers will be able to see high level system information.

Role	Reports Available	Description
Sender	Deliveries activity	List of your deliveries sorted by delivery access date and PayPal payment requirement.
	Packages activity	List of packages for which you are a sender or owner.
Report	System report	Summary information for usage covering a date range. This includes reports on users, deliveries, packages, and files.
User administrator	Users activity	List of all registered users, whether active, disabled, or with pending registration. Includes deleted users.
System administrator and Super user	Pending Deliveries report	List of deliveries that are pending. This may include any deliveries created while the delivery process is stopped, or deliveries created with an availability date in the future.
	System activity report	Listing of all transactions occurring in the system.

To view reports, click the **View Reports** link or icon from the home page. You will see all available reports based on your roles. Reports for Senders and Reporters are described here. Administrator reports are described in the Administrator's Guide.

Most reports offer filtering capability to show specific date ranges and search terms, and can be exported to CSV format.

Deliveries Activity

This report is available to users assigned the Sender role.

1. The Deliveries Activity page (Figure 71) displays your deliveries sorted by delivery access date in reverse chronological order. By default, deleted deliveries are not displayed. Click the **Show reports for deleted deliveries** link to view deleted deliveries. Deliveries can be filtered by date, and are searchable

Figure 71: Deliveries Activity page

> **Note**: You can click the View delivery icon 📝 in the last column to go to the delivery view page. Deleted deliveries are not editable and the view icon will not appear.

2. Click a delivery name to view the detailed delivery transactions sorted by date (Figure 72). The delivery report is exportable to CSV, is searchable, and can be filtered by date. Click the **Export to CSV file** link to export the list of deliveries.
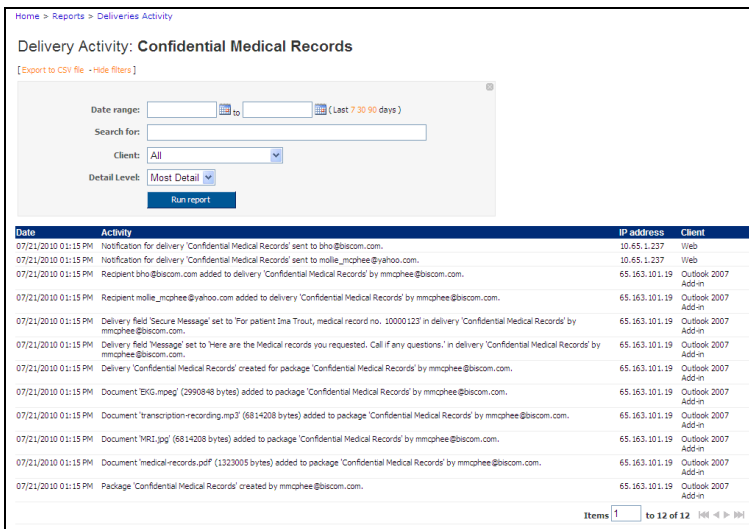
Figure 72: Delivery Activity report

3. To filter by the client (e.g. Web, Outlook, etc.), select the appropriate value from the drop-down list.

4. You can change the level of detail by selecting one of the five detail levels in a drop-down list. From least detail to most detail, the levels are:

- Critical
- Major
- Standard
- Detail
- Most Detail

Critical and Major levels will only display the most significant transactions (if any). Detail and Most Detail will display more transactions. Most Detail is the default level for delivery activity.

> *Note: For information on reports on deliveries requiring **PayPal payment**, see*
> *p. 72.*

Commented [MM10]: Add

Packages Activity

This report is available to users assigned the Sender role.

1. The Packages Activity list (Figure 73) displays the packages that you own. By default, deleted packages are not displayed. Click the **Show reports for deleted packages** link to view deleted packages.

Figure 73: Packages Activity list

2. Click the edit icon to update the package immediately. Deleted packages are not editable and the edit icon will not appear.
3. Click a package name to view the detailed package transactions. You will see the Package Activity report with the transactions sorted by transaction date (Figure 74). Package activity can also be filtered by date.

Figure 74: Package Activity report

System report

System report is available to users assigned the Report role. The System report displays high level and summary information.

Figure 75: System report

The report shows the last seven days of activity by default. Enter the date range to report on, or click on one of the quick report links to show activity in the last 7, 30, or 90 days. All report data is shown for the selected date range.

High-level information is supplied in the text under each section for User, Package, Delivery, and File. Click the **+/-** button or the text to expand or shrink the underlying report.

User	Lists OF users who have signed in, sorted by the number of sign-ins.
	List of users and the number of deliveries they have created.
Package	List of packages created, who created them, and when.
Delivery	List of deliveries created, underlying packages for the deliveries, who sent the delivery, and when they were sent.
	List of deliveries and how many times they were viewed by recipients.
Files	List and number of times files were downloaded from which deliveries, and file size.
	List of files uploaded into packages, who uploaded the files, and file sizes.

Section 9: Microsoft Outlook Add-in (Optional)

Microsoft Outlook Add-in

Outlook 2003, 2007 and 2010 users can take advantage of Biscom SFT and send large files or secure documents as easily as sending an e-mail. Your administrator may have created policies that re-route your Outlook e-mail messages through SFT based on the size of your attachments, or based on certain keywords entered on the subject line. You may also force a message to be sent securely through SFT.

Because of the seamless integration with Outlook, sending a secure delivery also leverages your existing contacts, as well as supports drag-and-drop capabilities to attach files.

If you are uncertain whether your Outlook has the capability to send secure message, contact your administrator.

Creating and Sending a Secure Delivery

To send a secure delivery via Microsoft Outlook, follow these steps:

1. Click the **New Secure Message** (Figure 76) button next to the New button in your Outlook toolbar.
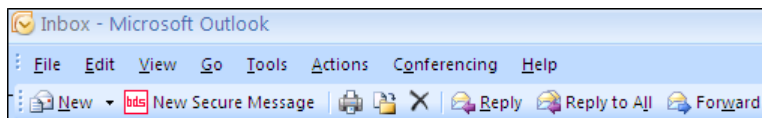
Figure 76: New Secure Message button

You can also open a standard Outlook message and then specify sending it via SFT during the composition of the message by selecting **Yes** in the SFT drop-down menu in your message toolbar (Figure 77).
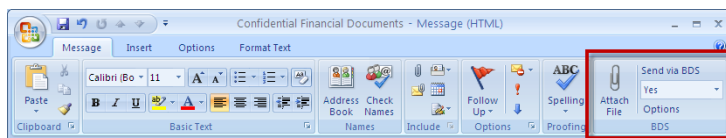
Figure 77: SFT tools in Outlook toolbar

5. Compose your message: add recipients, enter a subject for the message, and enter any content into the message field (Figure 78).
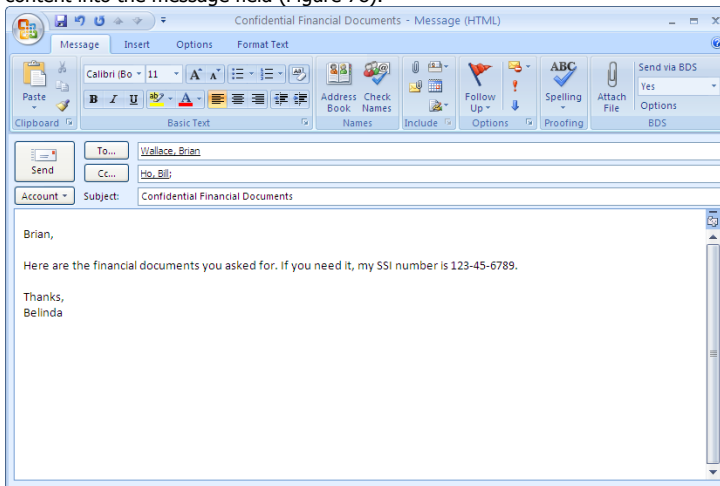
Figure 78: Creating a new Outlook Secure Delivery

> **Note**: The contents of the message field will become part of the delivery's notification message. If you want to send a secure message, click the **Options** button in the SFT tools (Figure 77) to display a secure message form. Your administrator may have configured the **Option** button to open a form for a notification message. In that case, the message in the body of the Outlook mail message is the secure message. For more information on secure messages and notification messages, see p. 46.

6. Attach files to the secure message as you would for any Outlook message - this includes simply dragging and dropping files from your desktop or network file server into the message, or using Outlook's attach file function.

   For very large files, the standard attachment methods may not work. In these cases, you can use the SFT tools **Attach File** button in the Message toolbar (Figure 77). Using this method does not make a copy of the file but rather sets a pointer to the file location and the file is uploaded directly from the location on the file system.

7. Select your SFT Options:

   - If you created your message by using the SFT New Secure Message button in the tool bar, the default "Send via SFT" option is **Yes**. If you change your mind about sending the message as a secure delivery after you've composed it, you can change the SFT option to **No** in the drop-down options list in the SFT tools (Figure 77).

     > **Note**: The **No** option may not be available to all users – your SFT system may not be configured for this feature.

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- If you created your message by opening an Outlook new message (and *not* by clicking the **New Secure Message** button), the default send option for SFT is **Use Policy**. If the message contains content or files that match the policies created by your administrator, the message will be rerouted through SFT automatically. Otherwise, the message will be sent through the normal mail server as a regular, unsecure e-mail. You can manually override the delivery setting to still send that delivery through SFT by selecting **Yes**.

- To override default behavior, you can change the *Use SFT* setting in the options toolbar to one of the following values:
    - **Use Policy**: The policies on the server are used, including file size limits and keywords, to determine whether to send the message through SFT.
    - **Yes**: The policies on the server are overridden, and the message will always be sent through SFT.
    - **No**: If this option is available to you, the policies on the server are overridden, and the message will not be sent through SFT.

- Click the **Options** button in the SFT tools (Figure 77 on p. 97) to add a secure message that the recipient can access only through the SFT server. The password fields are for adding an option password to be associated with the delivery. It is not recommended that you send the password via e-mail or through the notification message.

    > **Note:** *Your administrator may have configured the* **Option** *button to open a form for a* **notification** *message. In that case, the message in the body of the Outlook mail message is the secure message.*

8. Click the **Send** button to send your message.

Viewing Sent Deliveries in Outlook

1. If your message was sent through SFT, you will see a new message in your Sent Items folder with the SFT icon . This will contain information about the delivery and include any file attachments that went through the Outlook Exchange server. (Figure 65)
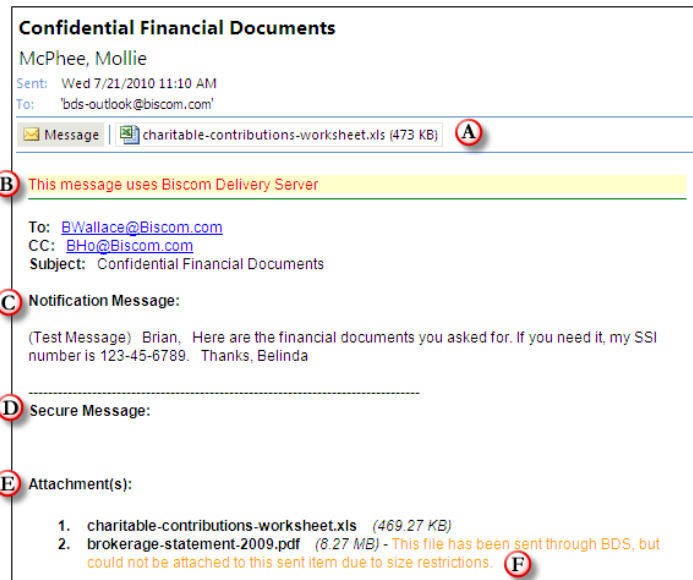
Figure 79: Sent Items view of message sent via SFT.

A. Copies of attachments sent as a part this delivery. If not all attachments are shown, see F below.

B. Notice that this message has attachments sent via SFT.

C. Copy of the notification message sent with this delivery.

D. Copy of the secure message sent with this delivery.

E. List of attachments sent with this delivery.

F. Your Outlook Exchange server may have restrictions on the size of any attachments it retains. If the file size exceeds the maximum size for Outlook, the attachment will still be accessible via the SFT Web application.

> **Note:** *The above figure does not represent the message the recipient receives. The recipient receives a standard notification e-mail message with a link (see Figure 43 on p. 60).*

2. You will see a sent message in your inbox (such as that in Figure 79) immediately after clicking **Send**; however, the delivery may not have necessarily gone through the SFT server yet. To view the upload progress, click the **Tools** menu in Outlook and select **SFT Uploads**. The SFT uploads in progress window appears, showing the current progress of any SFT deliveries sent through Outlook (Figure 80).
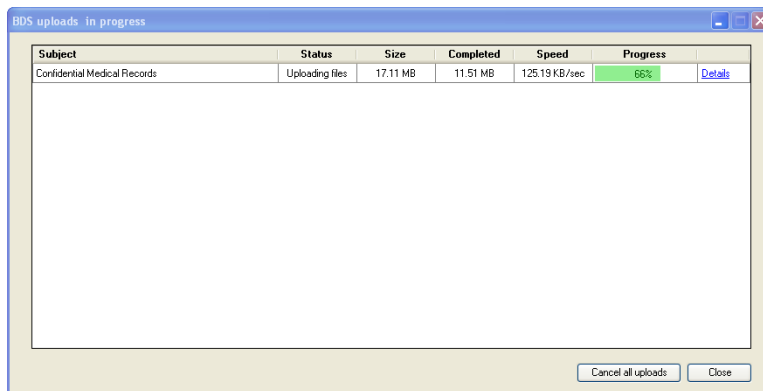
Figure 80: SFT uploads in progress window

Note: *The Outlook Add-in does not support replies, forwarding, or resending of secure messages. To edit, resend, or delete a delivery created through Outlook, sign in to the SFT Web application and view your Sent deliveries. From Sent deliveries, you can edit recipients, content, files, and delivery options.*

Section 10: Support and Troubleshooting

Frequently Asked Questions

Q. **What's the difference between a package and a delivery?**

A. A package is the collection of files and documents securely stored on the SFT server. The delivery of a package is the specifying of who has access to that package and when. You can have one package delivered in many different ways and to many different recipients, depending on the parameters you set up when you create the delivery (see **Creating a New Delivery**, p. 44).

Q. **What's the difference between an Express Delivery and a Standard Delivery?**

A. Express Deliveries are useful when a sender wants to send a package to recipients one time and does not foresee sending those files to more recipients at a later time. In this case, the package metadata is set to default values, and the sender can create the delivery and attach files in one step. If a sender has a package that he wants to send out repeatedly, or create multiple deliveries with different recipient lists or delivery parameters, a standard delivery would be a better method.

Q. **What is the difference between the Secure Message and Notification Message?**

A. When you enter text into the Notification Message, it is attached to the body of the e-mail sent to all recipients if you choose to send a notification message. Any text you enter into the Secure Message text box can only be viewed by recipients once they successfully sign in to the system and open your delivery.

Q. **Why can't I see all the icons or functionality that are shown in the figures in this User Guide?**

A. The icons (or functionality) that users see are based on the roles that you have been assigned. If you have questions about your roles or would like to have additional functionality, contact your Biscom SFT administrator.

Q. **When I click on an e-mail notification delivery link, I can't view the package anymore.**

A. Most likely, the sender of the delivery has deleted the delivery or removed you from the list of recipients. Another possibility is that the delivery has expired. In any of the above cases, you will no longer have access to the package and will no longer see the delivery in your list of deliveries when logged onto the system.

Q. **Can administrators view the contents of my packages or deliveries?**

A. No, administrators cannot view the packages or deliveries of other users, unless the administrator is also the owner of a package or a recipient of the same delivery.

Q. **I was in the middle of creating a delivery and stepped away from my computer. When I got back and tried to finish my delivery, I was signed out. What happened?**

A. When you sign into Biscom SFT, the application will "time out" in approximately 15 minutes if you have not been actively using it, unless the default timeout has been changed to a different setting. Consult your administrator about this setting if you have any questions.

Q. **What's the difference between a Sender and a Limited Sender?**

A. A sender, sometimes called a full sender, is a licensed user who has the ability to create packages and deliveries, view reports on the deliveries, and has access to additional features, such as the Outlook add-in, the desktop client, and the applet for uploading and downloading files.

A limited sender can create and send deliveries, but has several restrictions: limited senders cannot view reports on deliveries, edit an existing delivery, and does not have access to the additional clients and features. Limited senders can only upload three files per delivery, and files cannot exceed 100MB in size. Recipients of limited sender deliveries cannot securely reply. The capabilities of a limited sender are governed by the administrator who can provide or exclude certain delivery features, such as the ability to freely enter a recipient, the number and size of files that can be uploaded, and whether to allow limited senders to enter a subject and message in the delivery.

Q. **When I create a new user as a Sender, or import users with the Sender role specified, they do not have the sender role assigned. What's happening?**

A. You may have a system that has a restriction on the total number of Senders allowed on the system at once. Once the number of Senders has reached the maximum allowed, no new users will be allowed to have the Sender role assigned. Users added through the import facility will be created, but they will not have the Sender role assigned. You may remove the Sender role from one user and reassign it to another user on the system, as long as the total number of Senders does not exceed the maximum allowed.

Q. **I have the Outlook Add-in installed on my computer, but none of my messages seem to be going out.**

A.   There may be multiple issues here. First, check with your administrator that your server supports the Outlook Add-in (this is an optional module). Also, have your administrator check your SFT user and make sure that your user is allowed to use the Outlook Add-in. Finally, in your Outlook client, open the menu Tools > Options and select the Biscom SFT Outlook Add-in tab. Ensure the e-mail address and your user name and password are set correctly.

Appendix A: User and Contact Import File Formats

Import Formats

Users can import contacts using an XML file or a tab delimited text file. Administrators can import users into the system using an XML file or tab delimited text file. The user and contact import formats are similar, but user import data contains information that is not contained in the contact import data, and vice versa.

User Import

Tab Separated User Import File Format:

The file should have the following format:

Import Field	Notes	Example
firstname		John
middlename		J.
lastname		Smith
displayname	Replaces the e-mail address when displaying the username if this field is populated.	John Smith
e-mail	Required field	**jsmith@bigcompany.com**
password	If a password is entered, the default password specified in the import page will be used.	bosco
roles	Possible values: RECIPIENT, SENDER, REPORT, ADMIN If more than one is specified, separate them with a + sign. Values must be capitalized.	RECIPIENT+SENDER+ADMIN
outlook	This is only valid for users with the Sender role assigned	true
company		BigCompany, Inc.

jobtitle	Director of Cheese
workphone	617-555-2302
workmobile	617-555-6432
workfax	617-555-1232
workotherphone	617-555-0201
workaddress1	123 Main St.
workaddress2	Suite 200
workcity	Boston
workstate	MA
workzipcode	02110
workcountry	USA
homephone	617-555-0392

Notes:

- The list above shows the import fields listed vertically – however, the import file should have the fields listed horizontally.
- The import file should contain the import fields as the first row, separated by tabs.
- Enter data in subsequent rows under each field. If you are not specifying a particular field, enter a tab.
- If you want to align the text under the column headings, you can insert multiple tabs between the import data. However, you must select the checkbox when importing to condense multiple tabs into one tab.
- The columns can be arranged in any order.
- The roles assigned to a user are separated by a plus ("+") sign with no spaces between the role and the plus sign. The four roles above are the only roles accepted.
- The e-mail field is the only required field. If you do not enter values for the other fields, you must still enter a "tab" between the fields. This is especially important if you do not enter values for intermediate columns but you enter values for subsequent columns.

XML User Import File Format:

The XML file should have the following format:

```xml
<?xml version="1.0"?>
<contacts>
      <person>
            <name>
                   <first></first>
                   <middle></middle>
                   <last></last>
                   <display></display>
            </name>
            <e-mail></e-mail>
            <password></password>
            <roles>
                   <role></role>
            </roles>
            <outlook></outlook>
            <work>
                   <company></company>
                   <jobtitle></jobtitle>
                   <phone></phone>
                   <mobile></mobile>
                   <fax></fax>
                   <otherphone></otherphone>
                   <address>
                          <street1></street1>
                          <street2></street2>
                          <city></city>
                          <state></state>
                          <zipcode></zipcode>
                          <country></country>
                   </address>
            </work>
            <home>
                   <phone></phone>
            </home>
      </person>
</contacts>
```

Notes:

- Child elements of a tag may be entered in any order
- Certain characters must be escaped:

```
a.  &         ->     &amp;
b.  <         ->     &lt;
c.  >         ->     &gt;
d.  '         ->     &apos;
e.  "         ->     &quot;
```

Contact Import

These contacts are personal contacts and do not affect or pre-register users into the Biscom SFT. Only administrators can create users (see above) by using an import file.

Tab Separated Contact Import File Format:

The file should have the following format:

Import Field	Notes	Example
firstname		Laura
middlename		W.
lastname		Parker
nickname		Laura
e-mail		laura.parker@smallinsuranceco.com
e-mail1	alternate e-mail 1	lauraathome@gmail.com
e-mail2	alternate e-mail 2	
company		Small Insurance Company
jobtitle		Sales Associate
workphone		415-555-1023
workmobile		415-555-9823
workfax		415-555-6549
workpager		415-555-6544

workotherphone	415-555-2312
workwebsite	www.smallinsuranceco.com
workaddress1	882 Technology Drive
workaddress2	Rm. 322
workcity	San Francisco
workstate	CA
workzipcode	94109
workcountry	USA
birthdate	01/08/1980
homephone	415-555-2031
homewebsite	
homeaddress1	230 Battery St.
homeaddress2	Apt. 209
homecity	San Francisco
homestate	CA
homezipcode	94105
homecountry	USA
notes	Sold me insurance for my pet iguana
category	Business

Notes:

- The list above shows the import fields listed vertically – however, the import file should have the fields listed horizontally.

- The import file should contain the import fields as the first row, separated by tabs.

- Enter data in subsequent rows under each field. If you are not specifying a particular field, enter a tab.

- At least one of the following fields must be entered for each contact:

    a. First name

    b. Last name

      c.   Nickname

      d.   E-mail address

XML File Format:

The XML file should have the following format:

```xml
<?xml version="1.0"?>
<contacts>
        <person>
                <name>
                        <first></first>
                        <middle></middle>
                        <last></last>
                        <nick></nick>
                </name>
                <e-mail type="primary"></e-mail>
                <e-mail type="alt1"></e-mail>
                <e-mail type="alt2"></e-mail>
                <work>
                        <company></company>
                        <jobtitle></jobtitle>
                        <phone></phone>
                        <mobile></mobile>
                        <fax></fax>
                        <pager></pager>
                        <otherphone></otherphone>
                        <website></website>
                        <address>
                                <street1></street1>
                                <street2></street2>
                                <city></city>
                                <state></state>
                                <zipcode></zipcode>
                                <country></country>
                        </address>
                </work>
                <home>
                        <birthdate></birthdate>
                        <phone></phone>
                        <website></website>
```

```
                    <address>
                            <street1></street1>
                            <street2></street2>
                            <city></city>
                            <state></state>
                            <zipcode></zipcode>
                            <country></country>
                    </address>
            </home>
            <notes></notes>
            <category></category>
      </person>
</contacts>
```

Notes:

- Child elements of a tag may be entered in any order
- Certain characters must be escaped:

      a. &   ->   &

      b. <   ->   <

      c. >   ->   >

      d. '   ->   '

      e. "   ->   "

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